Lighthouse Solutions

"Enabling I.T. as a strategic resource"

Lighthouse™ crm

CRM Web Portal & Mobile App

CRM Scope

Modules	Processes
Customer Database	• Organization Structure • Business domain Category • Organization Category • Source of lead • Multiple Addresses • Multiple Contact Information • Product Consumption Capacities • Our Competitor's product purchase details • Product Offering(s) • Other details: Year of establishment, Turnover, Man Power, Status • Name of Competitor Company at account may also be captured.
Product Information	• Product Classification: Group for classification of products • Product Class Master, Group and Category Masters • Product Details and Application • Products Master details

CRM Scope

Modules	Processes
Sales Staff	• Sales Staff Positions • Sales Staff Reporting Hierarchy • Sales Staff Periodic Posting Details • Customer Mapping with Sales Staff
Customer Communication & Follow-up	• Details of contacts and communication • Noting of next communication or follow-up • Defining the customer status progress sequence master • Changing the status of customer on each communications • Customer Complaints/Feedback Entry • Data Mining of communications for one customer • Periodic Reports for the communication done by Sales Staff

CRM Scope

Modules	Processes
Campaign Management	• Details of Campaign undertaken by Company. • Campaign Costs elements • Upload of Campaign Attendees details thru excel template • Campaign Reports
Sales Staff Target Management	• Allocation of Sales Targets to the Sales Staff • Allocation of Work Targets to the Sales Staff • Allocation of Collection Targets to the Sales Staff • Actual Sales Data collection • Sales Incentive calculation for the sales staff • Report for Target vs. Achieved Analysis
Tour Planning Management	• Tour Planning Calendar for each sales staff • Defining the expense allowed for different grades of location and for different grade of sales staff • Daily Tour Reporting from Sales staff with the relevant information • Reviewing of Daily Reports by designated authorities

CRM Scope

Modules	Processes
Tour Expense Management	• Planning of Tour Advance based on the tour plan • Approval of Tour Advance by the defined hierarchy of authorities • Generation of Tour Advance payment advice to accounts • Tour Bill submission • Verification of Tour bills against the daily report submitted in the system • Verification of Tour bills against the allowed expenses limits • Approval of Tour Bills by the defined hierarchy of authorities • Engines to analyze daily reports (visits effectiveness), tour expense data

Sales Management (Ordering) for Sales Staff	• Sales Order Entry Interface (Sales Order / Size wise order entry / Amount Break up / Terms & Conditions)
	• Credit Control
	• Maximum Order Quantity Quota
	• Price List Interface
	  ○ Price List to be created on into ERP on periodic basis- Daily/weekly/open period.
	  ○ Broadcast of Real time MRP of all Products
	  ○ Area Wise Price List (If required)

CRM Scope

Modules	Processes
Payment Collection	• Cheque Collection Entry • Cheque Submission Status
Price List Management	• Area wise price list • Scheme specific price list
Schemes Management	• Quantity or Invoice Value based slabs • Slab wise reward or Point system • Bill-to-Bill, Periodic, Accelerated Schemes • Scheme redemption and accounting

CRM Scope

Modules	Processes
Secondary Sales Management-B2B a) Primary Customer Portal	• Order • Order Status • Account Status • Dispatch Status • Feedback • Complaints
b) Customer Sales Target	• Allocation of Sales Targets to the Primary Customers • Defining the sales incentive/ Rewards
c) Customer Scheme	• Launch New Scheme • Bill-To-Bill, Periodic, Accelerated Schemes • View Scheme • Modify Scheme • Approval of Scheme • Deletion of the scheme • Cancellation of Scheme • Extend any approved scheme • New Circular/ Scheme through reference

CRM Scope

Modules	Processes
Secondary Sales Management-B2C	• Retailer Management • Beat Plan • Retailer Order/Sales to our primary customer • DSR • Feedback/Complaints • Competitor Info Feedback • Payment Collection for Dealer/ Distributors
Territory Sales Management Retailer Portal	• Order to our Primary Customer • Feedback/Complaints • Consumer requirement Leads passed to retailer by our sales staff
Management Control and Reporting a) Marketing at Head Office	• Multi classification of items • Sales Promotion Schemes • Price Fixation • Field Staff Management including DSR • Targets to Dealers and Sales Staff

CRM Scope

Modules	Processes
b) At Primary Customer	• Geographical Masters • Distributor Master Data • Purchase Order to Head office • Purchase Request from Retailer • Inventory Status Report
c) MIS Reporting	• Summaries on Geographical coverage • Summaries on Product Coverage • Comparison with Previous Years/ Periods • Top –N products • Comparison of Top –N products with Previous years • Sales vs Expenses Analysis • Summaries on cross combinations with multi group • User defined reports engine

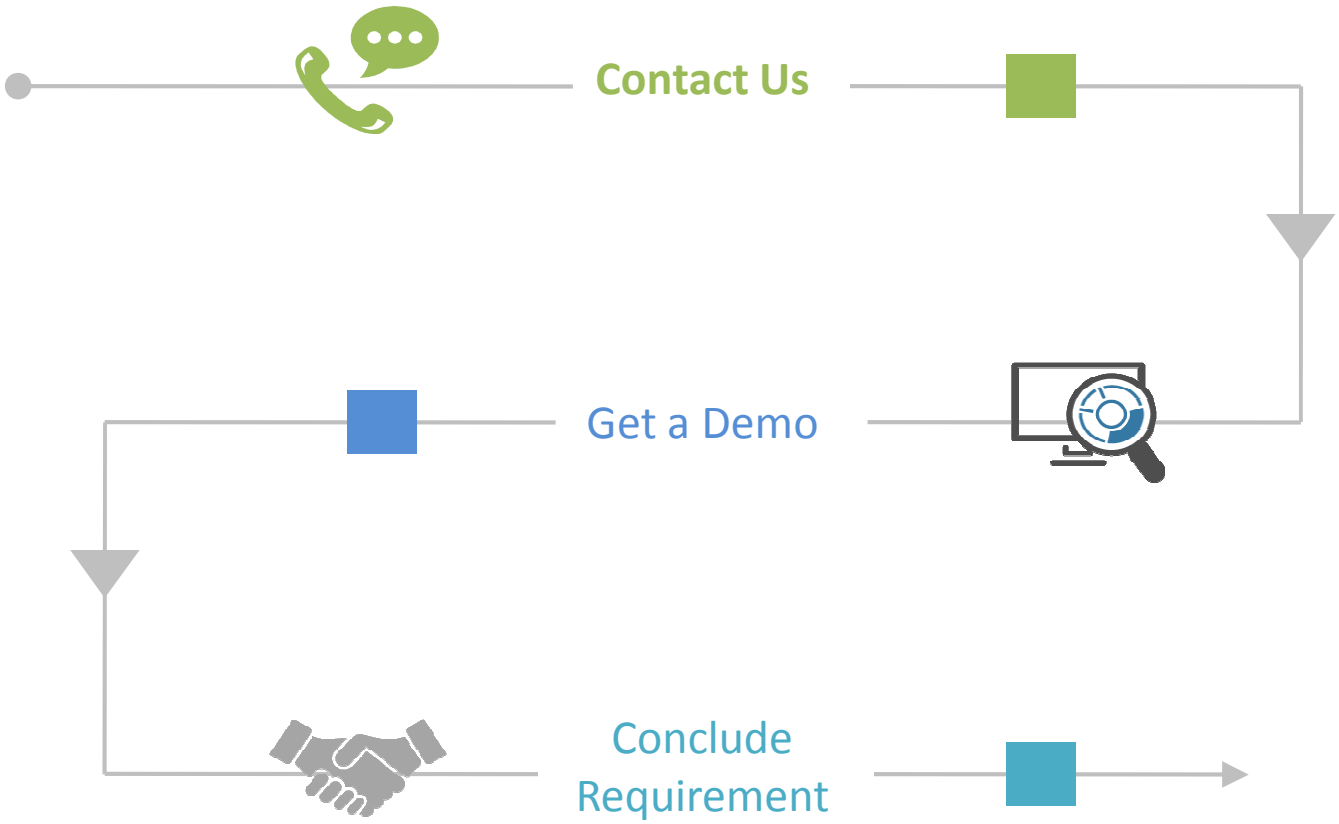
CRM Scope

Modules	Processes
d) CRM Reporting	CRM reports for a particular month wise or between dates wise and different filters are present for printing the report • Data Bank Report/Client • Client Wise Follow up Report • Contacted by Wise Follow-up Report • Daily Call Reports • Marketing Executive and Status Wise Follow-up Report • Report for Status (New Lead, Demo, Quotation)

Employee Portal

Modules	Processes
Employee Portal	• On click on selected party, extensive details as following can be viewed: ○ Party's month wise Target vs Sales ○ Party's Potential ○ Address Details ○ Equipment / Application wise – Item details • Client Follow-ups can be recorded in system • Parties accumulation at top level from bottom level to get holistic view of ○ Targets Vs Achieved ○ Current Follow-ups • Access to list of parties assigned to logged in user • Activities planned can be viewed by simply clicking on the date • Graphical view of Sales Progress Last Year Sales Vs This Year's Target Vs This Year's Achievement on monthly basis • Utilities talks about various small port lets like File Sharing, Discussion Forum, News etc • Tour Bills can be submitted using portal
Logistics GPS Info	• Integrate Mobile GPS data with above visit reports

How to move forward



Contact Us

mktg@lighthouseindia.com

+91 – 712 – 2243544, 2241406

www.lighthouseindia.com