

TSI Customer Relationship System (CRM)

Client Support System

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Executive summary

This document:

- Describes a customer relationship management system (CRM) for a Trade Support Institute (TSI). It is a tool to help the TSI manage the relationship with its clients. (What is CRM? on page 3).
- Lists the benefits that accrue to both TSI and client from the use of a Customer Relationship Management. (Benefits on page 5).
- Summarises the type of data that is typically held on a Customer Relationship Management. (Data held on the system on page 7).
- Provides examples of simple data and more complex data. At the simple end of the spectrum the system only contains the names and addresses of clients. Unfortunately, the simpler systems are of limited use to a TSI.
- Explains how an emerging TSI can build a Customer Relationship Management. Obviously they cannot be built overnight. They are built up piece by piece over a period of time. (How do you populate the system? Where do you start? on page 7)
- Contains a generic functional specification. The specification is flexible, as the requirements of each TSI will be unique. The more common and useful items are highlighted. The initial design must be flexible or scalable to take account of future needs.
- Identifies issues associated with the design, management, and use of a Customer Relationship Management. Specifically, issues that may contribute to the failure of the system are identified. (Why system fail on page 27).
- Identifies actions that will help to ensure the successful introduction of a Customer Relationship Management.
- Contains steps on how to start the process. (Functional specification of the system on page 28).

Recommendation for ITC

A Customer Relationship Management is fundamental to the management of a TSI network. All TSIs will have use for such a system.

ITC should consider commissioning the design of a generic web based TSI Customer Relationship Management along the lines described in this document. The system could be developed using one of the utilities identifies in Table 19: Different types of CRM systems on page 29.

The model could be populated with test data, and used by ITC experts for TSI training.

A more elaborate system could be sold by ITC to TSIs. Alternatively, it could be licensed, with ITC providing maintenance, customisation and upgrades.

What is CRM?

The “buzz” word is customer relationship management or CRM. The term means different things to different people. It depends on the industry and the application. You could operate a simple CRM system with pencil and paper. It could be a perfectly valid system. However its functionality would be very limited. A TSI needs something much more robust.

Wikipedia¹ states that:

Customer relationship management (CRM) is a term applied to processes implemented by a company to handle its contact with its customers. CRM is used to support these processes, storing information on current and prospective customers. Information in the system can be accessed and entered by employees in different departments...Details on any customer contacts can be stored in the system. The rationale behind this approach is to improve services provided directly to customers and to use the information in the system for targeted marketing and sales purposes.

These systems are variously described as a client database, Customer Relationship Management or a customer relationship management system (CRM) or Client Support System. The nomenclature or description is a matter of personal preference.

A TSI’s Customer Relationship Management is a database of client companies. Its primary goal is to capture the TSI’s relationship with the client. The system should satisfy some minimum criteria. It should:

- be easy to use and easy to update;
- fast;
- build around the client record;
- take account of the needs of the FTRs, the executives who work directly with clients and the management of the TSI;
- web based to facilitate multiple points of access;

¹ http://en.wikipedia.org/wiki/Customer_relationship_management

- most operations and key information on a client should be available from the home page.
- scalable, i.e. capable of expansion to accommodate the growing needs of the TSI.

It should be a “wiki” type of system, where the prime users, i.e. FTRs and client executives, enter data on the system. It is a collaborative environment. The FTRs and client executives can edit any record or document in a web browser using a standard WYSIWYG² editor much like a word processor. Anyone with the necessary permissions can edit the record.

The client executive, i.e. the person with overall responsibility for the company, is responsible for the client record.

A TSI will have hundreds, possibly a few thousand clients. The organisation’s objectives are typically to help its clients, who are primarily small to medium sized companies, to develop sustainable business. It will have multiple services to help its clients and these services will be provided by a number of foreign trade representatives (FTRs) and by other assets in the home market, such as a Market Information Centre. By definition the FTRs will have a wide geographical spread. Individual members of the network may never meet face-to-face.

A TSI is, therefore, a complex network. Personnel will interact with each other and with clients, remotely. Clients will have multiple points of access to the TSI. For example, a client could make contact with any of the FTRs, with personnel in a Market Information Centre, or with any TSI executive, home or foreign based. Management, TSI executives and FTRs need a method for tracking and recording these interactions. A Customer Relationship Management should be able to generate answers to the following questions:

- What has this TSI done for Client X over the past 2 years?
- Is this the first time we have worked for this company? Is it a valid client, and should we devote resources to answering the company’s questions? Has this company, who employs 10 people, sent the same request to every office in the network?

² WYSIWYG is the an acronym for *What You See Is What You Get*.

- How many companies in the Food Sector have we worked for over the past year? What did we do for them, and where?
- How many companies used the services of our office in <Location>? Who are these companies and what did they ask us to do?

The TSI's system must be able to handle hundreds of clients, track the usage of multiple services and requests, and permit access by a wide range of users. The utilities described in Table 19: Different types of CRM systems on page 29 could be used to build the system.

Note: It is critically important to understand that a TSI's Customer Relationship Management is not a "who-makes-what" directory or a directory of companies / exporters in a country. It may contain some of this information, but that is not its primary purpose. It is a database of clients. It contains a record of work undertaken for the client by the TSI.

Attempts to combine a "who-makes-what" industry directory with a Customer Relationship Management are very likely to result in disappointment.

Benefits

TSI benefits

A TSI will derive significant benefits from a Customer Relationship Management. It will enable the TSI to:

- Keep track of all substantive contact and work assignments for a client.
- Maximise efficiency by focusing on priority clients and not waste resources on non-priority clients, or entities that are not eligible clients.
- Ensure clients receive consistent treatment in all of their interactions with the TSI.
- Enable all divisions of the network to provide a uniform response to a client.
- Store all client information on one central database, which is available to all relevant staff. Everyone has access to the same client information.
- Segment the client base, thereby enabling the TSI to focus on priority clients.

- Track client behaviour and tailor services to meet individual client needs.
- Help senior management to judge the success of TSI activities.
- Build loyalty by enabling TSI executives to focus on named individuals in companies.
- Identify client preferences by identifying what services, in what locations, are used by what clients.
- Focus marketing campaigns, based on client preferences.
- Present the same client experience across the network.
- Help management evaluate what resources are being devoted to different sectors of industry.
- Help identify what sectors and markets are most active from a client perspective.
- Monitor progress against targets.
- Work more efficiently.

Client benefits

The clients of a TSI will derive significant benefits for the system. The client will:

- Deal seamlessly with the TSI network as one entity.
- Receive a uniform response from all sections of the network.
- Deal with a professional organisation that focuses on client needs
- Receive customised communications from the TSI.

Data held on the system

No two TSIs, or fully integrated trade promotion organisations, are the same. There are infinite variations and permutations. A TSI might be a department, branch or division of a ministry of commerce or its equivalent. It might be part of a ministry of foreign or external affairs. It might be a semi-autonomous or a fully autonomous entity supported by government or even one partly or wholly funded by the private sector. It might be an amalgamation of departments in two separate organisations. For example, a department in a ministry of industry might provide support in the home market for the FTRs, while the FTRs are employees of a ministry of foreign or external affairs. It might be a small organisation, with no FTRs or foreign based assets.

It is therefore difficult to specify with any degree of precision the information that should be held on a TSI Customer Relationship Management as each case will be different.

Some information will be easy to obtain. Other information might be quite difficult to obtain.

How do you populate the system? Where do you start?

Starting from scratch can be quite intimidating. Populating a Customer Relationship Management may seem a major task. Nobody likes staring at a blank screen. Where do you start? However, the process is likely to be much easier than initially envisaged. Data can be built up piece by piece over a period of time. All it takes is commitment and motivation, and a clear understanding by the executive staff who deal directly with clients, that the system will eventually help them do their job better. Everyone involved should be aware of the benefits the TSI will derive from a working system. The process must be managed; otherwise the build up is likely to fail. (See: Why system fail on page 27).

Let's assume that a medium sized TSI has 10 FTRs, and 5 client executives working with companies from the home market. These numbers are not important. They are just for illustration. Let's assume that each of the executives carried out only one task or assignment for 30 companies during the course of a year. This is really a very small number. Each executive undertakes a task for less than one company per week. If all of these interactions were entered on the system, at the

end of the year there would be 450 entries or pieces of data. If you reduce the client number by 30% to take account of duplicates, you arrive at a figure of 300 client records on the system. That's a respectable system. It has taken one year to build it up. Over time, it will grow and become more useful.

Initially company data might be extracted from multiple sources to start the population. However, the danger in doing so is that you run the risk of populating the system with companies who are not, and who may never be, clients. It must be emphasised that the system is not an industry directory or a "who-makes-what" directory. It's a database of clients.

It's better to have a small quantity of high quality data than a large quantity of irrelevant and / or suspect data.

Basic client data

The following broad category of client information is applicable to most TSIs.

Table 1: Basic data

	Basic data	Observation	See for further details:
1	Company name, address and contacts	Basic data required by all systems	Table 2, page 9
	Industry Sector / Segmentation	TSI Classification	Table 3 on page 10
2	Employment	Exact figure or an estimate.	Table 5 on page 12
3	Exports	Total or a breakdown. Exact figures or estimates.	Table 5 on page 12

Company name, address and contacts

Much of the data in Table 2 is self explanatory. When building a system from scratch concentrate initially on the important data. This is designated as **Required – Yes**. The fields designated **Required – No** can be populated over time.

Much of the information in this section would be similar to the data you would hold on a company in Microsoft Outlook.

Table 2: Basic company details

Field	Description / Observation	Required
Company name:	Self explanatory. Important that the full and correct company name is entered on the system	Yes
Trading name:	Trading name may be the name that the company is popularly known by.	No
Old name:	If applicable. In most cases this will be blank.	No
Address:	Full address. In some cases there may be multiple addresses. The system should accommodate this. There should be multiple fields for the address, permitting sort on a regional or city basis. (A separate section will deal with foreign addresses. See Table 4 on page 11.)	Yes
Primary contact:	Full name and title. Direct telephone numbers, mobile / cell phone numbers, email address, etc. Whatever is appropriate in the circumstances? Typically the contacts are: managing director or CEO, marketing manager or finance manager, etc. In some rare cases the contacts will be the production manager.	Yes
Secondary contact:	See Primary contact above.	No
Tertiary contact:	See Primary contact above. Number of contact fields can be extended if needed.	No
Web address:	<i>www.company_name.com</i>	Yes, if available

Field	Description / Observation	Required
Nationality:	May be very important. Some TSI may allocate a high priority to indigenous companies and a low priority to foreign owned companies.	Yes, if a TSI policy issue. Otherwise No.
National / legal company designator.	This is a link to the national companies' database office, and is verification that the client is in fact a legal entity.	No
Nature of Business	A short description of the business. E.g. <i>publishing services</i> , or light engineering, food ingredients, etc.	No. But very useful.
NACE Code:	<i>e.g. 5819</i>	No.

Segmentation of client base

Some form of segmentation is necessary. Table 3 contains data that enables the TSI to segment and categorise its clients. Each TSI will have different requirements. Table 3 contains suggestions as to how the client base might be segmented.

Table 3: Segmentation and classification of data

Field	Description / Observation	Required
Client:	Yes / No (Some companies may be on the system, but they may not be active clients.)	Yes
Sector:	The TSI should have a system for segmenting clients into different categories. The breakdown can be as simple or complex as is requires. A basic breakdown would be: Food, Tropical Fruits, Consumer, Industrial, Light engineering, Software and IT, Call Centres, etc. Use categories that makes sense.	Yes. TSI policy issue. TSI determines the classification.
Relationship:	Active /Not active. Use this field to identify clients that used the services of the TSI within the past 12 months. Some companies may be clients, but are not active clients.	No

Field	Description / Observation	Required
Region / Geographic location:	This may or may not be a duplication of the address fields. Geographic data can provide information on clients in a region. For example, the TSI may have an objective of developing industries outside the major cities, or in a specific region. This field can be used to help extract the data.	No. TSI policy issue.
Trading status:	Trading / Receivership / Liquidated All active clients will, by definition, be "Trading". It is useful to keep a record of companies who have fallen by the wayside.	Yes
Additional fields	Additional fields can be added depending on the requirements of the TSI.	No. TSI policy issue. System design issue

Foreign market presence

Many companies, particularly the larger ones, will have a permanent presence in important markets. The presence could consist of a full time sales person, or a local sales office. The system should be able to accommodate this data.

It is not essential to capture this information. However, it is extremely useful for the FTRs. It is also useful for management. If the system contains this information management would be able to generate a list of clients with a permanent presence in a particular market.

Although this information is not essential (Required – No) it is extremely useful.

Table 4: Foreign presence

Market	Description / Observation	Required
<i>Spain</i>	<i>Distributor in Madrid.</i> <i><Name of the Spanish Company with other details.></i>	No
<i>Brazil</i>	<i>Own sales office and distribution company.</i> <i><Name, address and details.></i>	No

Employment and exports

This information may be quite difficult to get. Over time clients will willingly divulge this information. In the absence of real data, it is extremely useful to estimate the level of employment and the value of the client's exports. For example, and a TSI executive should have some information to enable differentiation between a company that employs 300 people and has exports of \$5 million and a company that employs 5 people and has no exports. In the absence of real data the client executive should estimate figures for employment and exports.

Table 5: Employment and exports

Field	Description / Observation	Required
Year:	The data in this table will enable the TSI to track the client's exports and employment growth over a period of time. Depending on the comprehensiveness of the data the TSI can drill down through the data for more detailed analysis. (See Table 6 and Table 7.) Cumulative figures for export and employment and go to help monitor progress against targets. (See Table 8.) Although the information in this table may initially be difficult to get, in the absence of real data, use estimates. Estimates should be designated as such, e.g. \$400,000 vs. \$400,000 E. The "E" designating the figure as being estimated. It is essential to have some information on company size.	Yes
Turnover:	<i>\$400,000</i> ³	No
Turnover: Actual / Estimate		No
Exports:	<i>\$150,000</i>	No
Exports: Actual / Estimate		Estimate: Yes
Home market:	<i>\$250,000</i>	No
Home market: Actual / Estimate		No
Employment:	<i>15</i>	No

³ Data in italics is for illustration. It serves no other purpose.

Field	Description / Observation	Required
Employment: Actual / Estimate		Estimate: Yes

Employment and exports – drilling down through the data

Note: This section illustrates how a TSI could use a Customer Relationship Management for tracking exports and targets. This is a specialised application of a Customer Relationship Management. Clients will provide breakdown of exports and targets to a TSI where the TSI has a financial mandate. For example, the TSI might provide emerging industry with financial assistance to develop exports. The availability of the data might be a condition of receiving financial assistance. The section is for illustrative purposes only. It would take a TSI many years to build up a system with the level of data illustrated in Table 7 and Table 8. None of the information which follows is Required – Yes.

An advanced system can hold historic data broken down by market. . For example, it could hold details of exports for a number of years, broken down by market, and targets.

Table 6: Turnover & Exports (for illustration only)

<Client name>	Turnover	Home	Exports
2005	600,000	100,000	500,000
2006	800,000	200,000	600,000
2007	850,000	200,000	650,000
2008	1,100,000	300,000	800,000
2009	1,300,000	300,000	1,000,000
2010	1,900,000	400,000	1,500,000
2011	2,500,000	500,000	2,000,000

Table 7: Exports - breakdown by market (for illustration only)

<Client name> Market breakdown	2008	2009	2010	2011
France	400,000	400,000	500,000	600,000
Spain	400,000	600,000	900,000	1,300,000
Caribbean	0	0	100	100,000
Total	800,000	1,000,000	1,500,000	2,000,000

Using the data in Table 7 a TSI executive would immediately spot that the company is projecting significant export growth in the Spanish market. The TSI's major efforts on behalf of this company should be in Spain. There is little point in feeding this company with information on market opportunities in, say, the US or Japanese markets. The information is likely to be irrelevant, and could result in the company diluting its efforts in Spain.

The data in Table 7 could be combined into targets for groups of companies. For example the TSI might have a target to "increase the number of indigenous companies, from X to Y, who export in excess of 1,000,000 to the Spanish market by the year 2011." With the availability of the above data, progress against this target can be monitored, and the TSI can put processes and systems in place to ensure that Y number of indigenous companies meet the target. Extra resources may have to be put into the Spanish market to work with these companies.

Similarly, information on employment trend, if it is relevant to the activities of the TSI, could be entered on the system. Some TSI use employment numbers as one of the metrics against which they measure their success.

Table 8: Employment trends

Year	Employment
2005	50
2006	55
2007	60
2008	80
2009	85

TSI data on a client

A TSI's dealings with clients will be handled by different departments. For example, different FTRs located in foreign offices, specialists in a Market Information Centre, and of course the executive who has designated responsibility for the client in the home market. The information collected by the different departments and individuals must be shared. For example, the feedback received by one FTR to a market research report or to a business mission programme, could provide other FTRs with valuable information on the needs of the client. Team work is essential for a successful TSI.

Some executive should be designated as having the **primary responsibility** for the client. This executive will normally be based in the head office of the TSI, and all communication with the company should be brought to this executive's attention.

Anyone who logs onto the system should be able to determine who has primary responsibility for the client. The data in Table 9 identifies this information.

Table 9: TSI Team / Client executives / Account Executives

Field	Description / Observation	Required
TSI Executive: Name 1	The TSI Executive should be able to edit his / her profile.	Yes
TSI Executive: Name 2	If applicable. There may be more than one person working with the company, in which case the team of individuals should be identified.	No
(Work groups – where applicable)	Note: A system could be set up to enable the creation of work groups / teams. These groups form for projects or activities and then disband.	No

Table 9 captures some of the collaborative aspects of the work of a TSI. The table identified the members of the team (workgroup) responsible for the client. Of course the makeup of the team may change depending on the project.

Contact / activity log

A record of client interaction with the TSI is the most important elements of a Customer Relationship Management.

All substantive client contact should be stored in the client's history log.

The log provides client executives and senior management with a list of resources allocated to individual clients, and groups of clients. The TSI can estimate the amount and value of TSI input to a client company. Details of past market research requests; what offices have previously worked for the client; participation in projects, etc. In the absence of this data the TSI cannot attempt to estimate what contribution they have made to the company's success. However, it must be remembered that a 15 minute telephone conversation with an experienced FTR in possession of current market information may be much more valuable to the client than a market research report running into dozens of pages prepared by executives in a market information centre.

Table 10: History, contact & activity log

Field	Description / Observation	Required
Date:	Self explanatory (Pick list). The system could identify when an enquiry was received, the date it was acknowledged, and the response date.	Yes
TSI Contact:	TSI executive (Automatically entered. Same as user log in)	Yes
Client Contact:	Name of the executive in the client company. (Automatically entered if only one contact or from a pick list. If using a pick list, the TSI executive should be able to edit the list.)	Yes
Type:	Visit to or from the company, a telephone conversation, request via email, etc. (Pick list)	Yes. TSI to define the Type.
Description / Note:	<i>Discussion with CEO <name> regarding distribution options in Miami for the company's range of food ingredients. Work has been commissioned from the FTR in Miami, and from the Market Information Centre. MIC is checking FDA requirements. Promised to get back to the company by <date>.</i>	Yes
Client meeting report:	Self explanatory	Yes

Field	Description / Observation	Required
Activity:	Record of what the TSI has done for the client. Description of an activity. <ol style="list-style-type: none"> 1. Trade Fair participation. 2. Market research carried out on behalf of the company. 3. Trade samples purchased on behalf of the company. 4. Details of enquiries made to a Market Information Centre. 	Yes

If a client record is updated by a FTR, on anyone else in the TSI, the client executive, i.e. the executive with responsibility for the company, should automatically receive email notification that the record has been updated, and by whom. The mail should be generated automatically.

Projects

Projects are part of the activity log. Table 11 lists some projects.

Table 11: Projects

Date	Description	FTR / Office	Project leader	Team	Status
<i>Jan</i>	<i>Trade mission to Brazil</i>	<i><Name></i>	<i><Name></i>		
<i>Feb</i>	<i>CeBIT Germany</i>	<i>Dusseldorf</i> <i><Name></i>	<i><Name></i>		●
<i>Mar</i>	<i>Seminar on food packaging for US</i>	<i>HO <Name></i>	<i><Name></i>		

Status: Use a flag to designate urgent attention. A Red Flag might indicate that the event needs immediate attention. A Red Flag designation might automatically trigger an email to the client executive, drawing attention to the issue. Use designations that make sense to the particular TSI.

You can drill down through the information. Here is an example:

Table 12: Project details

Trade Mission to Brazil. Jan 2009	Status	Observation
Company 1	Confirmed	See report, etc.
Company 2	Confirmed	
Company 3	Awaiting confirmation	

Table 12 should contain information of relevance to the project team. The user could select a company and drill down for more detailed information. For example in the above example, “*See report, etc.*” would open the report in question on screen.

Management play a vital role

Management play a vital role when the system is being built up. Senior management must explicitly endorse the system. It should be made clear to all TSI staff that if an activity is not registered on the Customer Relationship Management, then in the view of senior management, the activity did not take place. If an activity is not recorded, the activity does not exist.

Linkages and keeping team members informed

Not essential, but very useful. Suppose an FTR, based in Paris, received a call or communication from a client requesting work in the French market. The FTR, without reference to anyone else on the network accepts the assignment. The FTR enters a record on the system briefly describing the work assignment and the deadline for delivery.

As soon as the client record is updated, an email is automatically send to the executive in head office alerting the individual that the client has commissioned work from the FTR in Paris. See: Contact / activity log on page 15.

This has the added advantage of keeping all members of a team informed. Nobody can say, “*I didn’t know anything about this. Nobody told me!*”

Table 13: "You have mail" and team work

Field	Description / Observation	Required
You have mail:	The client executive is kept up to date, and may choose to respond with additional information. See: Table 9: TSI Team / Client executives / Account Executives on page 15.	No
Subscribe / Unsubscribe:	FTRs could subscribe or unsubscribe to email notifications about a particular client.	No

Administration module

This is standard on any database system, and is self explanatory.

Table 14: Administration

Administration	Description of sub menus	Required
Add new client	Self explanatory	Yes
Transfer client / reclassify client	Self explanatory	Yes
Favourites	Add client to favourite list	No, but very useful.
Validation queue	Request for immediate validation of data.	No, but very important. See page 22.

Favourites enables users to navigate quickly to important clients. Not essential, but very useful.

Documents and attachments

The system should be able to accept attachments to a client record. Reports written for the company by any of the FTRs could be deposited in "documents" and attached to the client record. Everyone with access to the client record could have access to the documents. Here are two examples:

- A report written for the company by an FTR based in Rome would be of interest to the FTR based in Paris.
- A contract for participation in a trade fair detailing the company's requirements.

Table 15: Documents attached to a client record

Field	Description / Observation	Required
Documents	Attachments to the client record.	No

Charging for services

Most TSIs operate some form of “charging for services”. The system could track these charges. Examples of charging are:

- A percentage of the cost of providing a specialised service is recovered from the client. This might be the purchase of trade samples, or the purchase of tender documents.
- A Market Information Centre may charge for an elaborate information search which used paid for on-line databases.
- Some TSIs charge for consultancy services. Charging is used for refining demand for certain services, and is rarely used as a primary source of revenue. However it must be tracked.
- A percentage of the cost of organising a trade fair is recovered from the participants.
- Clients pay a fee for participating on a trade mission.

Table 16: Tracking charges and cost recovery

Field	Description / Observation	Required
Charges	Charges or cost recovery	No

Client satisfaction

An important metric for measuring the health of a TSI is client satisfaction. The system could automatically send the client an email, containing a questionnaire, after the TSI undertakes a substantive piece of work for the client.

The response could be sent directly to the TSI or to a third party who analyses the data on behalf of the TSI.

The request for feedback can be simple or comprehensive. Initially, it is better to **keep it as simple as possible**. Experience would indicate that clients won't respond to complex questionnaires.

Here is an example of a simple request for feedback:

*Dear <name>,

We set up a series of business meetings for you in Spain. Please let us know if you were happy with the meetings, and if the introductions met your requirements.

Please let us know if there is any way we can improve the service.*

Or more personally:

*Dear Philip,

I set up a series of business meetings for you in Spain. Please let me know if we were happy with the meetings, and if the introductions met your requirements.

Please let me know if there is any way we can improve the service.*

Use whatever style that works.

Based on client feedback, the TSI can modify the service and where necessary improve the delivery mechanism. For example, a TSI might produce an elaborate market research report, of which it is proud, when all the clients wants is an informed opinion on an issue, within 3 to 4 days of the enquiry.

Advanced issues – a target driven TSI

Some advanced TSIs are driven by metrics and targets. They use a Customer Relationship Management to track TSI contributions to clients and monitor progress to specific targets. See: Employment and exports – drilling down through the data on page 13.

Table 17: Targets

Management	Description of sub menus	Required
Strategic targets for the organisation	1. Gross targets	No
	2. Targets by sector	
	3. Targets by region	
	4. Targets by office	
Export gains	1. Overall	No
	2. By region	
	3. By sector	
	4. Projections	
Financial information	Financial information of priority clients. Note: Very few TSI track this information or have access to it.	No
Financial assistance	If the TSI provides financial assistance to clients in the form of grants the Customer Relationship Management should contain a module which tracks all financial inputs.	No. Yes if TSI provides financial assistant to clients.
	1. Applications received	
	2. Approvals	
	3. Claims	
	4. Payments	

Data entry and data validation

The Customer Relationship Management is a “wiki” type system. The users of the system enter and update the system. The principle users are the FTR and the client executives who work directly with the clients. It is they who populate the system.

Periodically the record should be validated. Validation checks the integrity of the record, from a database point of view. There should be a small team of people, maybe an individual, responsible for validating data. The record belonging to each “active” client should be validated on a regular basis. Exactly how “regular” is a matter for the management of the TSI. Some records may only need validation once every year, or longer. Records belonging to priority clients and active clients may need validation more frequently.

The front screen of the Customer Relationship Management should show when the record was last updated, and by whom, and also when it was last validated.

Although verification is not required, it should be pointed out, the unreliable and inaccurate data, if it is widespread, would significantly reduce the usefulness of the Customer Relationship Management.

Table 18: Verification and last updated

Field	Description / Observation	Required
Last updated by:	Name	Yes
Date:	Date	Yes
Verified by	Name	No?
Date:	Date	No?
Data quality:	A metric indicating the quality or confidence in the client record. For example accuracy rated from <i>Low</i> , <i>Medium</i> , <i>Good</i> , or <i>Excellent</i> .	No

Other useful additions

1. A spell checker with custom dictionaries.
2. A section to hold “private” notes which are only accessible to the client executive and other designated individuals.
3. A facility to save a search or report as a template. See: Reports on page 24.
4. An audit trail of changes made to a record.
5. History of activities on carried out on behalf of a client can be sorted by latest- or oldest-first.
6. A “recent items viewed” list.

Reports

In the first instance, senior management, FTR's and the client executives should define what they want out of the system, and reports should be designed around those needs.

Here are some suggestions for contents of reports:

1. Search facility to include keywords so users can find companies, projects, and other data quickly.
2. Client search: print the details
3. Basic client details
4. All client activities. This is a history of all work carried out for the client by the TSI. The information can be restricted to certain dates, i.e. all activities between <Date 1> and <Date 2>.
5. A list of all clients that an FTR has worked for between <Date 1> and <Date 2>. **My Clients**. Broken down by different classifications, as required.
6. A list of all clients that a Trade Office has worked for between <Date 1> and <Date 2>. **My Clients**. Broken down by different classifications, as required.
7. A list of all clients that an FTR or Trade Office has worked for between <Date 1> and <Date 2>, together with a brief description of the work undertaken. **My Clients + details**. Broken down by different classifications, as required.
8. A list of all priority clients for an office, and an indication if any work was carried out for these clients. **Clients**. Broken down by different classifications, as required.
9. A list of clients (both Active and non Active) with a sales office or other permanent presence in a market.
10. A listing of companies that are to contribute to the organisation's targets broken down in a way that makes sense to the TSI / TPO. **Targets**. Broken down by different classifications, as required. This is a very important

report. It will show if the majority of work carried out by an office or an FTR is related to the organisation's targets. Is the FTR spending time on the correct activities?

11. **My Tasks.** A report with details.
12. A **search function.** The search function should be designed to meet the needs of the users of the system. What information from the system do the users need to help them do their jobs?

Note: Many reports will have multiple uses. The system should have a build in Report Generator capable of producing Basic and Advanced reports. These pre-designed reports should be available from a menu. Pre-designed reports should address at least 80% of reporting needs.

Management issues

Confidentiality, privacy and security

A client database will contain commercially sensitive information about clients, a record of all TSI interaction with the client, and commercial targets. The data is confidential. It must be secure, and only accessible to personnel with a need to access it.

The system will have different levels of access. For example, all personnel would have access to client name, address, and contact details. There would be a restriction on commercial, financial and other data.

The exporter must explicitly understand that the TSI:

- Will never discuss the client's confidential business with a third party.
- Will ensure details of the client's business are only discussed with the client or the client's authorised representative.
- Will respect client confidentiality.
- Will not transfer data to a third party.

It may be necessary to give clients written assurance that their data will not be shared with third parties without prior consent and the safeguards in place to prevent illegal access by third parties.

Many countries have **Freedom of Information (FOI)** legislation which may entitle a client to copy of the record on request. Care must therefore be taken to ensure information is accurate.

Access privileges

The System Administrator should be able to give or restrict access privileges at different levels, e.g. the entire system, industry sector, client, department, or project. Whatever makes sense to the particular TSI.

Why system fail

Customer Relationship Managements fail because they do not live up to expectations. There are multiple reasons.

1. The project was limited to software installation. It is looked on as an information technology (IT) project and therefore someone else's responsibility. It was driven by the needs of an information systems department.
2. The front line trade representatives and users of the system were not consulted prior to its implementation, nor were their needs taken into account.
3. The project was too ambitious. The TSI wanted to accomplish too much too fast.
4. The system does not have the unambiguously endorsement and support of senior management. See: Management play a vital role on page 18.
5. The system doesn't meet the needs of the primary users, i.e. FTRs.
6. Users were not motivates to learn how the system works. They were not given information how to provide input, and are not trained as to how to extract information from the system.
7. The system is too complicated. The front end contained a non-intuitive graphic user interface (GUI), and confusing navigation. Users ignore it.
8. Users were not encouraged to provide feedback as to what's wrong the system. Feedback must be encouraged.
9. The system is too slow and perceived to be more trouble than it is worth.
10. It is not web enabled.
11. The system cannot be easily expanded to meet the growing needs of the TSI. The system does not scale well.
12. Users ignore it because the data held on the system is inaccurate and unreliable.
13. There are major gaps in the data. Records are not kept up to date.

14. Wasn't sufficient time given to build up a system that meets the needs of management, FTRs and the executives in the home market with responsibility for the client;
15. Nobody is responsible for verification of data. It's always someone else's problem.

Functional specification of the system

The TSI should form a working group to draw up the functional specification of a Customer Relationship Management.

The working group should contain representatives of all user groups. Typically the user groups will be FTRs, client executives, project organisers, and secretarial staff.

The working group should:

- Form a vision as to the function of the system.
- Consult widely throughout the TSI with the view to determining needs of front line staff (FTRS, client executives) and senior management.
- Based on these requirements brief information technology personnel who are then charged with building the system.
- The system should be a web based. It should have a modern, attractive, intuitive graphic user interface (GUI).
- The interface should be tested by actual users before it is rolled out throughout the organisation. Ask for volunteers.
- The data must be well structures. The system design should be such that it can be expanded, enhanced, and upgraded. This is an IT issue, and there are practices and processes for constructing databases. (This issue is beyond the scope of this paper.)

This document could form the basis for a functional specification

Development of the database

Many of the commercially available systems, and there are dozens of such systems, are geared towards the management of a sales force and for customer technical support tracking. It is for this reason that the commercially available systems may not have the flexibility and functionality required by a TSI.

Microsoft Access is not suitable for the development of a TSI Customer Relationship Management. Although it is a relational database, difficulties may be encountered scaling the system. It is not suitable for remote access via the web.

The top CRM software vendors in 2006 – 2007 are listed by Wikipedia⁴. The two leading application vendors, SAP and Oracle, are too sophisticated for a TSI. They have applicability in very large companies, e.g. banks and airlines, with hundreds of thousands of customers. Microsoft SQL Server is ranked as No. 5.

Microsoft SQL Server⁵ and the equivalent OpenSource product, **MySQL**⁶ are tools that should be considered for the development of a TSI Customer Relationship Management. Both of these utilities are classified as relational database management system (RDBMS).

Table 19 lists the different systems.

Table 19: Different types of CRM systems

	Size of client base	Method for developing a CRM System	Observations	Cost	Multi-access	OK for a TSI
1	Small number of clients.	Pencil and paper. A collection of index cards, with each client's information on a separate card.	Easy to implement. No flexibility. An intuitive paper based system. Easy to populate. Easy to set-up. Very limited reporting.	Zero	No	No

⁴ http://en.wikipedia.org/wiki/Customer_relationship_management

⁵ See: <http://www.microsoft.com/sqlserver/2008/en/us/> and http://en.wikipedia.org/wiki/Microsoft_SQL_Server. SQL stands for Structural Query Language.

⁶ See: <http://en.wikipedia.org/wiki/MySQL>. MySQL is OpenSource. Cf Microsoft Office and OpenOffice.

	Size of client base	Method for developing a CRM System	Observations	Cost	Multi-access	OK for a TSI
2	Few hundred clients. One point of contact. Limited number of services.	Simple database, e.g. Microsoft Excel or an equivalent spreadsheet would work. List based system.	Easy to design and implement. Limited report generating capability. Easy to populate. Easy to set-up. Quickly breaks down as the number and types of services increases. Only suitable for one access point.	Negligible	No	No
3	Few hundred to a thousand clients. One point of contact. More complex list of services.	Microsoft Access or database.	More complex to design and set up. Can handle more complex data than a spreadsheet. Access is a relational database. Limited report generating capability. Quickly breaks down where there is more than one point of access. Not a suitable option.	Costly to set up and maintain.	No	No
4	Few hundred clients to thousands of clients. Many different types of services. Many services are customised. Multiple points of contacts and multiple points of access to the data.	Microsoft SQL Server, or equivalent relational database systems, e.g. MySQL. (See 5 below). Microsoft ⁷	Effort and commitment needed to design the system. Difficult to set-up. Can be expanded to take account of the growing needs of the organisation. Unlimited report generating capability. Can handle multiple points of access. Web based system.	Licence costs. IT Support and network costs	Yes	Yes

⁷ Microsoft Dynamics. See <http://www.microsoft.com/dynamics/en/us/default.aspx>

	Size of client base	Method for developing a CRM System	Observations	Cost	Multi-access	OK for a TSI
5	Same as 4. Few hundred clients to thousands of clients. Many different types of services. Many services are customised. Multiple points of contacts and multiple points of access to the data.	MySQL	Same as 4 above. MySQL is Open Source. Effort and commitment needed to design the system. Difficult to set-up. Can be expanded to take account of the growing needs of the organisation. Unlimited report generating capability. Can handle multiple points of access. Web based system.	Free product. Some costs may be associated with support. IT Support and network costs	Yes	Yes
6		SuperOffice	Used by the Swedish Trade Council. (See: Appendix: SuperOffice, Page 32.)		Yes	Yes
7		Saratoga ⁸	Cf SuperOffice		Yes	Yes
8		Abalon ⁹	Cf SuperOffice		Yes	Yes
6	Thousands of clients, multiple points of contact, multiple services.	SAP ¹⁰ , Oracle	Applicability in banks, airlines, insurance companies, and similar organisations	Very large	Yes	No

Bugs and new feature requests

A Customer Relationship Management will develop over time. It will always be a “work in progress”. Users should be encouraged to report bugs in the system and to submit suggestions for new feature requests to the IT Department or system developers.

⁸ Saratoga CRM. See <http://www.saratogasystems.com>

⁹ Abalon CRM. See <http://www.abalon.se>

Appendix: SuperOffice

Note: SuperOffice was selected in 2005 by the Swedish Trade Council as their CRM utility. The following information is for illustration and should not be considered an endorsement for SuperOffice.

- STC evaluated several options before settling on SuperOffice. At the time (2005) SuperOffice seemed to offer the best combination of price and functionality.
- If they carried out the evaluation in 2009 the choice might be different. Buying a ready-made system meant access to services, access to new releases, updates and upgrades. The availability of local support infrastructure influenced the decision.
- Although the SuperOffice system is an off the shelf system it is highly customised to the needs of STC.
- Although STC are happy with SuperOffice they recommend that ITC should look at the options provided by Microsoft, Saratoga, Abalon and SAP. The CRM market is continuously evolving and other options are available.
- According to the SuperOffice web site they have 11,000 users. SuperOffice ASA has headquarters in Oslo, Norway. Sales offices are located all over Europe: Norway, Sweden, Denmark, Germany, Netherlands, Switzerland, UK and Japan. In addition to the SuperOffice sales offices, they have active partners in Spain, Italy, France, Ireland, Poland, the Czech Republic, Finland, Australia, Canada and the US.
- The following non-profit / public sector organisations, which includes UNDP, use SuperOffice

¹⁰ SAP. See <http://www.sap.com/solutions/business-suite/crm/index.epx>

Figure 1 Non-profit and public sector organisations using SuperOffice

-
- Dansk Industri (www.di.dk)
 - Business Region Göteborg, (<http://www.businessregion.se/>)
 - Finansrådet Denmark
(<http://www.finansraadet.dk/english/toolkit/forside/>)
 - Kommunenes Sentralforbund (<http://www.ks.no/>)
 - Cfi (<http://www.cfi.nl/public/websitecfi/>)
 - UNDP - Office of Communications
 - Linköpings Kommun LKDATA (<http://www.linkoping.se/>)
 - ISPCC (<http://www.ispcc.ie/>)
 - MBO Raad (<http://www.mboraad.nl/>)
 - IPAF (<http://www.ipaf.org/>)
 - European Environment Agency (<http://www.eea.europa.eu/>)
 - Dansk Røde Kors (<http://www.drk.dk/>)
-
- SuperOffice CRM integrates with office productivity tools, including Microsoft Outlook, Lotus Notes, and Microsoft Office.
 - Contact in SuperOffice
 - Cathrine Mula
International Sales Manager
Ms Mula Sattler
SuperOffice AS
Wergelandsveien 7, NO-0167 Oslo
P.O. Box 1884 Vika, NO-0124 Oslo
Direct: +47 23 35 40 34
Mobile: +47 934 66 034
Fax: +47 23 35 40 03
cathrine.mula@superoffice.com
www.superoffice.com
 - SuperOffice has an office in Switzerland.

Mr. Ralf Sattler
SuperOffice Team Brendel AG
Pfeffingerstr. 19
CH-4153 Reinach / BL
Tel: +41 61 3383737
 - Much of the functionality defined in this document could be covered by the utility.

- Here are some screens:

Figure 2 CRM Contact card

The screenshot displays the SuperOffice CRM interface. At the top, a browser window shows the URL `http://localhost/SuperOffice/default.aspx`. The main menu includes File, Edit, View, Company, Diary, Project, Selection, E-mail, Reports, and Help. A sidebar on the left contains navigation icons for Company, Diary, Project, Selection, Inbox, Reports, and Tools. The central area features a contact card for **Star Services AS**, including contact details and a calendar for April 2009. Below the card is a table of contacts with columns for Mr/Ms, First Name, Last name, Title, Mobile phone - Phone, Direct phone - Phone, and E-mail.

Star Services AS
 Head Quarter
 Werglandsveien 7
 P. o. Box 1345, Wika
 01243 OSLO
 Norway
 Telephone: 22 45 70 00 Reception
 Fax: 22 45 70 01
 Web Site: http://www.starservices.com
 E-mail: info@starservices.com

Our Contact: **John Rowling**
 Category: Customer A
 Code: StarServ
 Number: 10067
 VAT No.:
 Business: Services
 Project coordinator: Hannah Hofman
 Photographer: Mary Jones Clark
 Creative contact: Edwin Moses

Month: April 2009

Mon	Tue	Wed	Thu	Fri	Sat	Sun
14	30	31	1	2	3	4
15	6	7	8	9	10	11
16	13	14	15	16	17	18
17	20	21	22	23	24	25
18	27	28	29	30	1	2
19	4	5	6	7	8	9

Mr/Ms	First Name	Last name	Title	Mobile phone - Phone	Direct phone - Phone	E-mail
Ms.	Rachel	Stones	CEO	92 35 70 05	22 45 70 05	rs@starservices.com
Mr.	Tom	McKean	Sales Director	92 35 70 70	22 45 70 70	tm@starservices.com
Mr.	Kenneth	Frost	Account Man	93 47 50 73	22 45 70 73	kf@starservices.com
Mr.	Donald	Larks	CFO	92 35 79 92	22 45 70 02	dl@starservices.com
Mr.	Jack	Fairholm	Senior Accou	92 45 70 78	22 45 70 78	jf@starservices.com
Ms.	Jasmine	Kahn	Project Manag	92 35 70 79	22 45 70 79	jk@starservices.com
Mr.	Jimmy	Olsen	Account Man	94 56 34 35	22 45 70 81	jo@starservices.com
Ms.	Susanne	Thorsen	Creative Direc	92 35 70 80	22 45 70 80	st@starservices.com
Mr.	Lars	Svenser	Production Ms	92 35 70 82	22 45 70 82	ls@starservices.com

Figure 3 CRM Activity log

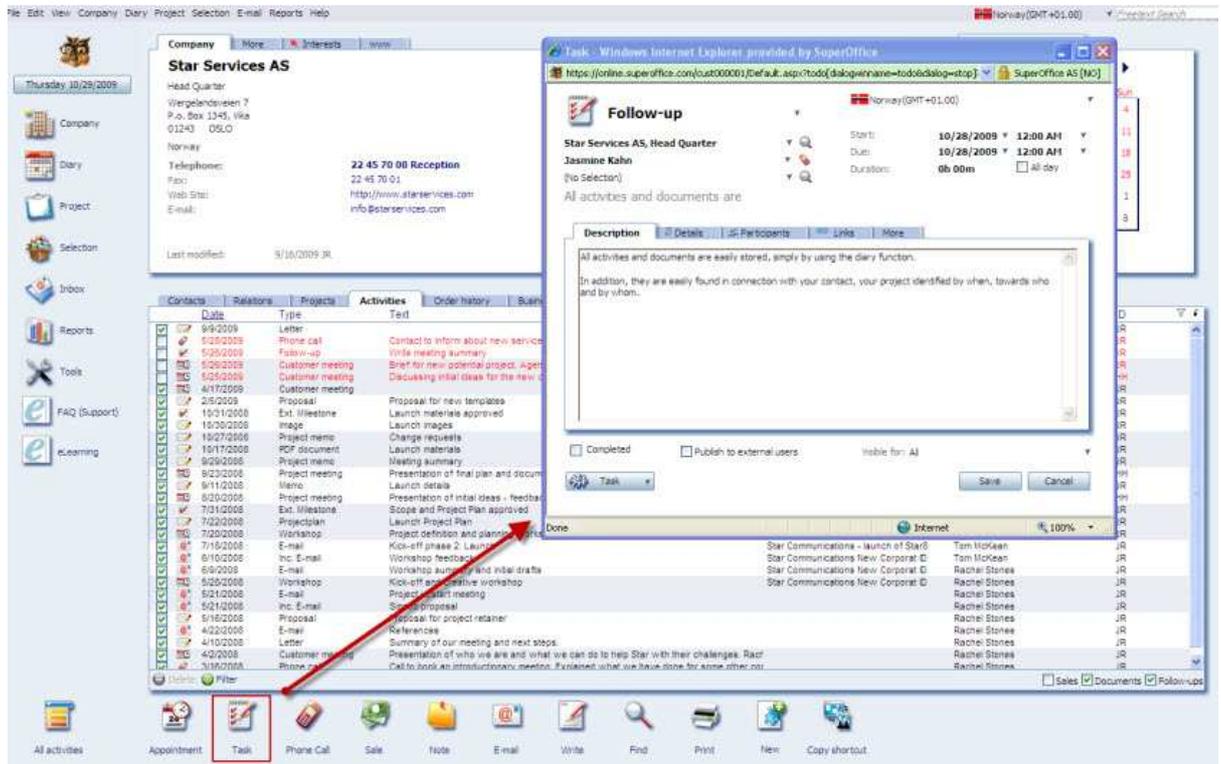


Figure 4 CRM Diary and activities

The screenshot displays the SuperOffice CRM interface. At the top, the browser address bar shows 'http://localhost/SuperOffice/default.aspx'. The main window is titled 'SuperOffice 6.web' and contains a navigation menu with options like 'File', 'Edit', 'View', 'Company', 'Diary', 'Project', 'Selection', 'E-mail', 'Reports', and 'Help'. The central area is a diary view for 'Monday, May 25, 2009', showing a timeline from 8am to 12pm. Activities include: 'Liberty Communications' (Weekly sales meeting), 'Star Services AS, Head Quarter' (Customer meet), 'British Airways' (Project meet), 'Toyota Norge AS' (Phone call), 'Dun & Bradstreet Norway AS' (Phone call), and 'Hennes & Mauritz AS' (Customer meet). A calendar on the right shows the month of April 2009. Below the diary is a table of activities with columns for Date, Type, Text, Company, and Contact. At the bottom, there is a toolbar with icons for 'All activities', 'Appointment', 'Task', 'Phone Call', 'Sale', 'Note', 'E-mail', 'Write', 'Find', 'Print', 'New', and 'Copy shortcut'.

Date	Type	Text	Company	Contact	ID
5/8/2009	50% Second	250,000.00 New campaign	Coca-Cola	Linda Baxter	JR
5/7/2009	30% Proj	550,000.00 New spring campaign for l	Iles AS	John Ode	JR
4/30/2009	30% Proj	150,000.00 This is an offer you cant n	Coca-Cola	Linda Baxter	JR
4/17/2009	Other	Write a new article for New York Time	Liberty Communications	Mary Jones Clt	JR
4/10/2009	Inforeque	Discussing ahw to organize the comm	Dinamo Story Film AS	Tomac Backstr	JR
4/10/2009	50% Sec	1,290,000.00 Revidet budget for the r	Coca-Cola	Linda Baxter	JR
4/8/2009	50% Sec	200,000.00 Ny v&e kampagne	Iles AS	Freddy Hoffina	JR
3/18/2009	80% Sho	745,000.00 Campaign launch	Starbucks Corporation	Emile Larkin	JR
2/27/2009	50% Sec	269,000.00 New Technology - New tir	Nera Networks AS		JR
2/27/2009	80% Sho	375,000.00 Fly direct-campaign on TV	Scandinavian Airlines Syst	George W. But	JR
2/27/2009	30% Proj	1,450,000.00 Keep it simple - Step 3 o	Rema 1000 Norge AS	Bent Evensen	JR
1/6/2009	50% Sec	500,000.00 Launch of the next step of	Coca-Cola	Linda Baxter	JR
10/31/2008	Ext. Miles	Launch materials approved	Star Services AS, Head Qu	Susanne Thort	JR
7/31/2008	Ext. Miles	Scope and Project Plan approved	Star Services AS, Head Qu	Susanne Thort	JR
5/22/2008	Proposal	Simplestiv wins - Campaign	Rema 1000 Norge AS	Laila Sanstevro	JR

- UNDP are users of SuperOffice. See Figure 5 Description of UNDP's usage on page 37.

Figure 5 Description of UNDP's usage

Industry: Nonprofit, Education & Public Sector



SuperOffice CASE STORY: UNDP

Easy and quick access to data is indispensable to UNDP's global work

"We chose to structure the knowledge sharing with SuperOffice. Even though the system is actually developed for keeping track of customer relations, it is also a good thing for the employees that an overall view is created."

Interview with Henrik Juul, Management Specialist, UNPD

The Challenge
The human resource management of UNPD (United Nations Development Programme) is based in Copenhagen. 7-8 years ago, the UN organization was in the same situation as many other organizations: An overall view of communication and contacts was needed. Things were filed in many different ways. There was a chance that a lot of important information could be lost, should any employees quit or move to other jobs. "However, it is a matter of institutional knowledge which ought to be accessible for everybody in the organization – also in future", says Henrik Juul, Management specialist UNDP.

The Solution
Today, the human resources department functions as an administrative unit and knowledge bank to almost 4,000 employees spread all over the world. Here, it is possible to have any question concerning salaries, pensions, employment contracts etc. Clarified. The main part of the employees that are handled in Copenhagen are employed in the actual UNPD, whereas almost 1,300 works with four UN partner organizations that have chosen to draw on the human resources department's competencies. The persons who are responsible for HR in these organizations are able to get information from SuperOffice, even though the offices are based in e.g. Tokyo or Kuala Lumpur. They connect to the system through the internet, and accordingly they experience the advantage of having access to structured and updat-

ed knowledge. Among other things, the SuperOffice solution of the UNDP is integrated into the central ERP system that is controlled from the head quarter in New York. All basic data and personal information are automatically transferred and updated in SuperOffice once every 24 hours.

The Results
"The value of our investment in SuperOffice has only become higher since we started using the system. Four years ago, we handled about 10,000 emails a month with queries and documents. Today this number has increased to almost 25,000, whereas the number of users has doubled to a little more than 160. Despite the growth and the many new users, the effort to maintain the system is manageable", says Henrik Juul.
"Today, SuperOffice is the natural central point for the employees in the human resources department. All relevant knowledge is accessible via this solution. All working processes are closely connected to SuperOffice. "When our employees receive an email containing an inquiry, they are immediately able to get an overall view of the previous correspondence and to see how the person in question works, if he/she is married or not and how the pension conditions are", says Henrik Juul.
"It is exactly the accessibility to all data that makes SuperOffice an indispensable tool for us. In this connection, it is of great value to us that it is so easy to expand SuperOffice. Without being an experienced com-

puter programmer, I have through the years been responsible for 10 different new developments based on specific user requests, which has made SuperOffice our system. Among other things, a tab that gives access to viewing the employee's pay checks," says Henrik Juul. SuperOffice also plays an important part in relation to the many global activities in UNDP. When the partners from Tokyo or the colleagues from the head quarter in New York needs an answer to a question, the time difference can be a brake block.
"There is no doubt that SuperOffice plays a part in securing a faster administrative procedure. Colleagues on the other side of the planet are able to access the system directly when we are closed in Denmark and to see whether the mail has been answered or the document has been submitted for approval. Both parties will be winners in that respect. The colleagues will get answers faster, and we do not need to spend time on the question", says Henrik Juul.

The Customer Benefits at a Glance

- Is able to handle 100% more emails
- Reduction of the administrative procedure time
- No need for a computer programmer in order to make adjustments in SuperOffice



Notes