

# PlanMill CRM

## Customer Relationship Management



### Integrated CRM solution

- **My Workspace.** Key Performance Indicators, Contacts and Reports.
- **Accounts & Contacts.** Knowledge base for prospects, customers, actions, campaigns, etc.
- **Opportunities.** Track sales forecast or competitors, manage prospects, sale stages; update deals, and record customer interactions.
- **Requests.** Assign requests to different members of sales teams by email notifications.
- **Actions.** Keep track of customer activities. Plan and export to calendar and monitor when due.
- **Campaigns.** Manage groups; use targeted marketing materials, business gifts, and mass emails.
- **Collaboration & Document Library.** Store customer materials and activities; share with colleagues by email.
- **Analytics & Reporting.** Analysis of your business reports, sales, and processes from multiple angles.
- **Connect & Upgrade.** Connect your applications via PlanMill Open API. CRM SaaS users can also upgrade easily to PlanMill PSA or ERP products.

### CUSTOMER RELATIONSHIP IN FOCUS

**CHALLENGE:** Can you easily follow customer cases or keep track of them in different sales stages? Do you need that crucial sales graphs for the executive board meeting in the next hour? Are you a small and medium-sized business that demands advanced support for the running of everyday operations? Are you expanding your CRM systems in the future because your business is growing?

These questions and related challenges are faced by companies and their management everyday. Smooth and efficient running of customer relationships need working tools that not only provide functional support, but also grow alongside with your business.

### RUN YOUR BUSINESS SMOOTHLY

**SOLUTION:** PlanMill web-based CRM serves growing, mid-sized and large corporations with focus on service business. Our solution gives you the cutting-edge tool for successful customer relationship management.

PlanMill CRM is a comprehensive sales, marketing, and support business suite. It is equally perfect for small and growing businesses with big ambitions, while fitting the needs of large or international companies with versatile and demanding environments.

There are no restrictions to manage your data with our flexible deployment options. You can choose either web-based CRM SaaS (Software as a Service) or On-Premise solution.

SMART WEB-BASED SOFTWARE SOLUTIONS FOR SERVICE BUSINESS — POWERED BY FINNISH INNOVATION

## Real-time system to manage your customer relationships

### Solid and reliable operational base

PlanMill CRM generates a solid and reliable operational base for managing customer relationships. Our CRM solutions streamline sales, service, marketing and help desk operations, thus improving customer relationship management. Customer satisfaction improves at each stage of sales and services and success can be easily repeated.

### Customer-centric CRM

Executives not only require more effective ways of managing customer relationships, but also a more customer-centric ways of doing business. This is possible when using the proper tools to deliver the experience that customers expect.

### Freedom of Choice

For companies who want an outsourced IT-server infrastructure and are comfortable with housing their customer information outside their firewall, PlanMill offers dedicated hosting capabilities through PlanMill SaaS. Customers receive all the benefits of hosted applications including regular upgrades and maintenance.

PlanMill SaaS offers a more secure environment compared to many other solutions. This is because the data, application and APIs are managed independently and there is a separate front-end server for added security.

For customers who would like to have all their PlanMill information managed by IT-managers behind their own firewall, we offer PlanMill On-Premise, a deployment option that gives your team full control to get the maximum flexibility out of your CRM, Project, PSA or ERP application.

### More reasons to use PlanMill CRM

- **All activities can be related to an account**
- **Integration with calendar and email**
- **Multi-currency, date formats and language for international companies**
- **Easy and cost effective upgrades**
- **Comprehensive Import and Export capabilities**
- **Social Media and Maps.** Access, monitor, and deliver information using top social media channels: LinkedIn, Twitter and Google Maps.



### QUICK FACTS

- **AVAILABILITY**  
PlanMill SaaS – our IT environment  
PlanMill On-Premise – your IT environment
- **SYSTEM REQUIREMENTS**  
PlanMill 12.1 or later versions (On-Premise users)
- **MULTI-BROWSER SUPPORT**  
Google Chrome, MS Internet Explorer, Mozilla Firefox, and Safari
- **LANGUAGES**  
PlanMill provides you with interchangeable user language options in English, German and Finnish.
- **ADD-ONS**  
Robust PlanMill extensions such as Absence, Email Capture, Product Catalogue and Multicompany/currency are easily added.
- **SERVICES**  
PlanMill's Comprehensive Services include: Support, Deployment, Customization, Integration and Training to meet your specific business needs.
- **EASILY DEPLOYED**  
PlanMill CRM can be implemented quickly with no large IT infrastructure required. As a dynamic solution, it is suitable for growing, mid-sized, and large organisations.
- **30-DAY FREE TRIAL**  
Get a free trial at [www.planmill.com](http://www.planmill.com) or contact us through [sales@planmill.com](mailto:sales@planmill.com).