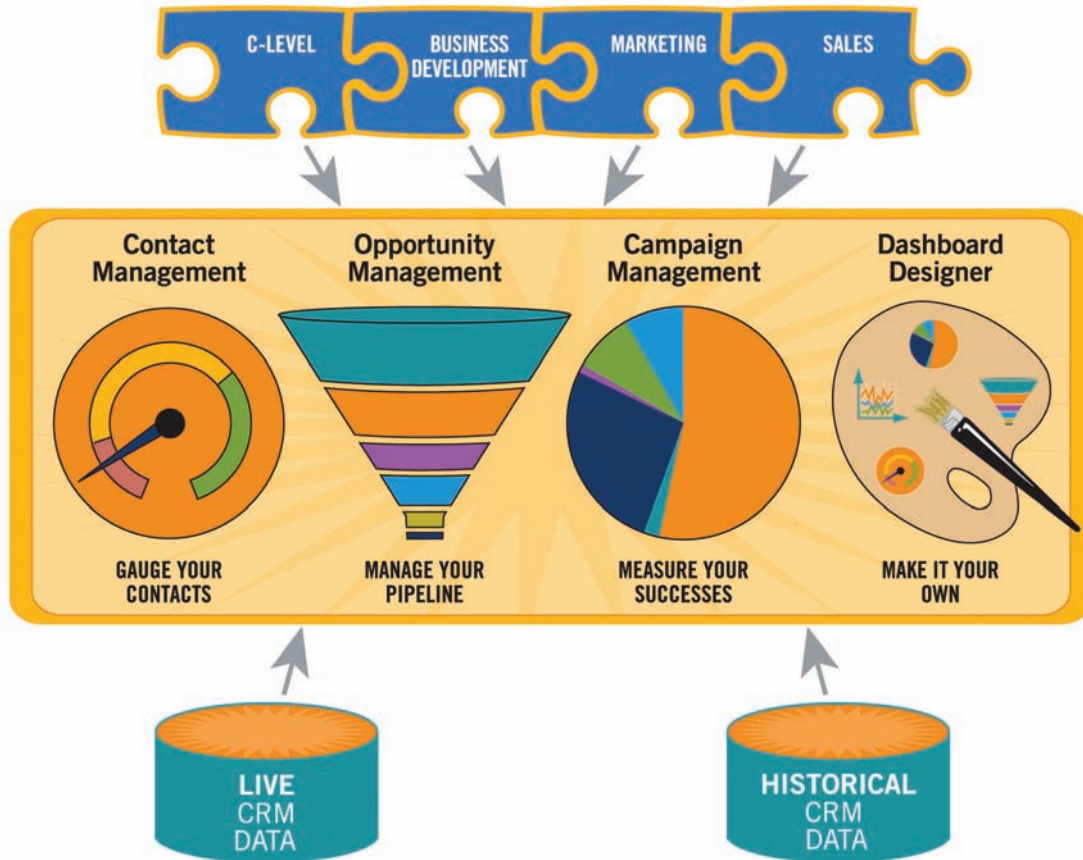




# CRM ClearSight™ Dashboard

A product of West Monroe Partners



## Make your CRM system work harder.

To remain competitive, you must do more than simply manage current business. Uncovering opportunities, managing and cultivating relationships, and continually perfecting your marketing approach all necessitate the need for data – data that can be pulled from your current software and translated with the right tool.

The CRM ClearSight™ dashboard is the tool that helps your customer relationship management (CRM) system work harder.

- ◆ Do you know why your business development efforts or marketing campaigns are successful or unsuccessful?
- ◆ Are you missing opportunities because it's cumbersome to monitor activity?
- ◆ Can you accurately measure contact activity or the health of your business relationships?
- ◆ Do you have intelligible data you can act on immediately?
- ◆ Is your staff using your CRM data as an integral part of the way they conduct business?

The CRM ClearSight™ dashboard is the tool that helps your customer relationship management (CRM) system work harder. At a glance, you can visualize the status of your key performance indicators (KPIs), assess the health of your business, and prescribe a course of action – the type of insight that can drive more effective marketing and relationship management behaviors across the organization and over time.



### Manage by fact.

The CRM ClearSight™ dashboard works seamlessly with leading CRM systems like LexisNexis® InterAction® and Microsoft Dynamics CRM to provide a current view of business metrics. Its three robust modules: campaign, opportunity, and contact management – deliver the information you need to make decisions with clarity and confidence.

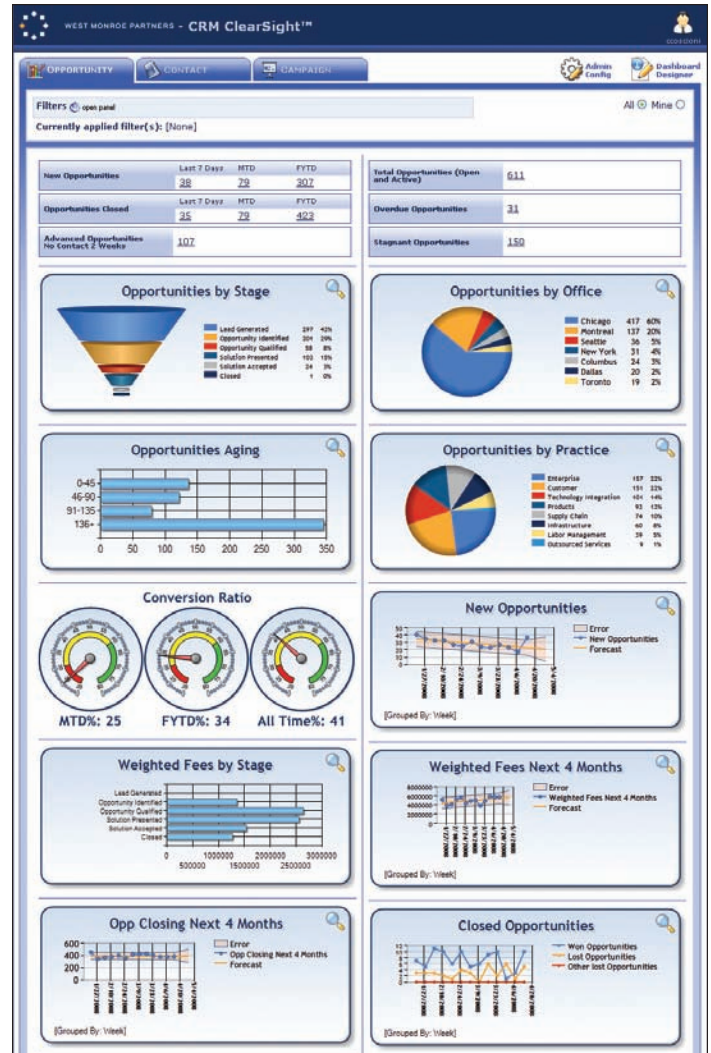
### Opportunity Management: Gauge your growth potential.

The Opportunity Management module enables your organization to track up-to-the-minute data and react quickly to trends according to a variety of characteristics:

- ◆ Status , age of opportunity and conversion ratios
- ◆ Revenue and weighted fee estimates
- ◆ Trends by week, quarter, month, or year-to-date
- ◆ Overdue, stagnant, and advanced opportunities
- ◆ Other measures configured to your business development needs
- ◆ Filtered by sales stage, date, practice or unit

### Who benefits from Opportunity Management metrics?

- ◆ Executives with business development or market segment oversight Individuals with accountability for particular prospects or customer relationships
- ◆ Management teams tasked with projecting future revenues, particularly where long sales cycles are involved
- ◆ Individuals with accountability for particular prospects or customer relationships
- ◆ Marketing leaders assessing penetration of key segments



The CRM ClearSight™ dashboard's Opportunity Management module tracks opportunities according to a variety of characteristics – including age of opportunity and conversion ratios.



### Contact Management: Consider the quality.

The Contact Management module enables you to measure the strength and health of your contacts, track CRM usage and adoption, and monitor the quality of data in your CRM system:

- ◆ People and company contacts and relationship maps
- ◆ Degree and timing of activity, such as neglected contacts or most contacted companies
- ◆ Data quality indicators, such as incomplete records or uncategorized records
- ◆ Activity by method of contact type: email, phone, meeting, etc.
- ◆ Activity by internal office, division, or individual

### Who benefits from Contact Management metrics?

- ◆ Executive decision makers who need to understand trends, relationship strengths and other KPIs
- ◆ Individuals with accountability for particular customer or prospect relationships
- ◆ Marketing and sales leaders responsible for CRM and sales teams



### Campaign Management: Measure your marketing success.

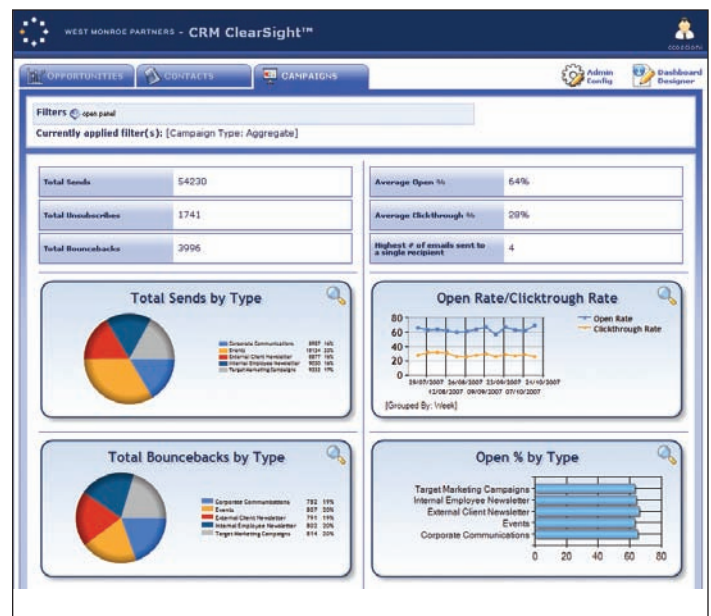
The Campaign Management module interfaces with the popular Tikit™ eMarketing solution to track results for a variety of campaigns, including e-newsletters, direct marketing mailings, corporate announcements, events, and other communications.

The CRM ClearSight™ dashboard's Configuration Wizard enables users to create targeted campaigns and configure specific KPIs, charts, and trends by type of eMarketing campaign. Available metrics include:

- ◆ Sends
- ◆ Bounce backs and un-subscribes
- ◆ Views, open rates, and click throughs
- ◆ Email fatigue (number of emails sent to a particular user during a given date range)

### Who benefits from Campaign Management metrics?

- ◆ Executive decision makers who need to understand trends, relationship strengths and other KPIs
- ◆ Individuals with accountability for particular customer or prospect relationships
- ◆ Marketing and sales leaders responsible for CRM and managing the sales teams





### Make it your own.

Create a personal snapshot of your business with the proprietary Drag-and-Drop Designer™. Individual users can select the information most important to them and build their own dashboards. Choose different KPIs, charts, and gauges; see real-time and/or historical data; then export it to a presentation or spreadsheet.

Developed using flexible, Web-based Microsoft .NET technology, the CRM ClearSight™ dashboard enables you to tailor output to your business and CRM system, customize tables and charts, and deliver the exact information your business needs.



The proprietary Drag-and-Drop Dashboard Designer™ enables users to customize their dashboards—no programming required.

The CRM ClearSight™ dashboard requires a registered copy of SQL Server 2005.

### Waste no time.

With the CRM ClearSight™ dashboard, it is easy to turn CRM information into the insights that can drive your company's marketing and sales strategies. The convenient Administration Module enables your CRM administrators to add new KPIs, charts and graphs, and filters – with the click of a mouse rather than complex coding changes.

Administrators also can:

- ◆ Manage diverse user groups by securing access by user type or role
- ◆ Customize the dashboard's default look and feel for your organization or by user group
- ◆ Create a skin that matches your corporate look and feel

The CRM ClearSight™ dashboard works straight out of the box – there's no need for complicated configuration, time-consuming training or costly custom programming. Implementation costs are minimal. For questions or further needs, you'll have access to technology experts who created the software and use it today.

### Turn information into advantage.

Good information is one of the keys to competitive advantage. The CRM ClearSight™ dashboard delivers a comprehensive and actionable view of your business – one that reinforces effective relationship-building behaviors over time. Use it to:

- ◆ Mine relationship data, uncover new prospects, and identify opportunities for cross-selling and team selling
- ◆ Improve current customer satisfaction Keep contact data clean, current, complete, and accurate
- ◆ Improve CRM adoption and usage throughout your organization

Talk to West Monroe Partners about putting the right CRM information at your fingertips. That's business in the right direction.