



white paper

Sales Force Automation

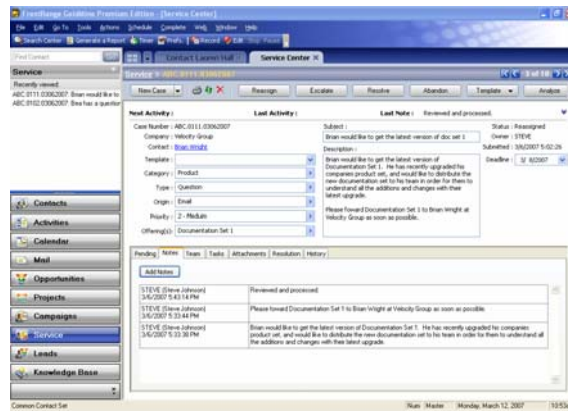


Customer Management



Integrated Business Processes for Small & Mid-Sized Businesses

Why Upgrade to GoldMine® Premium Edition?



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# GoldMine® Premium Edition "Top Reasons Why to Upgrade"

Has your business grown and evolved since you first started using GoldMine® Corporate or GoldMine Standard Edition? Are you facing different challenges within your business? If so, there has never been a better time to upgrade to the newest product in the GoldMine solution family - GoldMine Premium Edition. In addition to the features that you already know and love about GoldMine Standard or Corporate Editions, Premium Edition provides new benefits to CRM users, including case management and a number of productivity enhancements for greater user efficiency. Here are a few of the reasons for you to consider upgrade to the newest solution brought to you by a mid market CRM leader – GoldMine Premium Edition.

## # 1 Complete the Customer Lifecycle

With Case Management included in GoldMine Premium Edition, you now can control the entire customer lifecycle in one application. You can manage your customers from the campaign and lead stages, on to sales and opportunity management, then into servicing and supporting of those customers, with management and reporting capabilities prevalent through out the solution. Case Management functionality includes case tracking, Case Management (escalations, reassignment, etc.), Activity and History Tracking, Knowledge Base searching, and Visual alerts to help support staff manage and resolve their cases more efficiently.

The screenshot displays the GoldMine Premium Edition Service Center interface. The main window shows a case record for 'ABC.0111.03062007'. The case details include:

- Case Number: ABC.0111.03062007
- Company: Velocity Group
- Contact: Brian Wright
- Category: Product
- Type: Question
- Origin: Email
- Priority: 2 - Medium
- Offering(s): Documentation Set 1

The 'Next Activity' is 'Reviewed and processed.' The 'Last Activity' and 'Last Note' are also 'Reviewed and processed.' The 'Description' field contains the text: 'Brian would like to get the latest version of Documentation Set 1. He has recently upgraded his companies product set, and would like to distribute the new documentation set to his team in order for them to understand all the additions and changes with their latest upgrade.' The 'Status' is 'Reassigned', the 'Owner' is 'STEVE', and the 'Submitted' date is '3/6/2007 5:02:26'. The 'Deadline' is '3/ 8/2007'. The interface also shows a sidebar with navigation options like Contacts, Activities, Calendar, Mail, Opportunities, Projects, Campaigns, Service, Leads, and Knowledge Base. The bottom status bar shows 'Num | Master | Monday, March 12, 2007 | 10:53am'.



## **# 2 Never Get Blindsided Again**

Never again will you have a sales meeting hijacked due to a support issue that you were not aware of. From marketing to sales to support to management, you now have a full view into customer interactions. The new Cases tab provides a view into the status of cases involving any contact in GoldMine. Your sales force can now meet customers with confidence, as they are able to view any outstanding cases that a customer or prospect may have. Nothing can replace the ability to proactively address any open issues before talking about additional sales opportunities. GoldMine Premium Edition provides you a complete view into all your customer activities.

## **# 3 Leverage the Loyalty Factor**

We have all heard statistics about how much more expensive it is to acquire a new customer than it is to retain one. Some studies show that it may be as high as 7-10 times more expensive to get a new customer. It is now more important than ever that you focus on turning your service and support organisations into revenue generation engines, and moving them away from merely being a cost centre. GoldMine Premium Edition helps you understand and leverage your most loyal customers since their entire customer lifecycle information is stored in one solution.

## **# 4 Utilise the Latest in Windows Technology**

GoldMine was chosen as the only mid-market Sales and Marketing Solution included in the Microsoft Windows Vista™ launch. Keep all your existing GoldMine data, and use it on your new computers. Stay ahead of the curve by using the latest GoldMine Premium Edition on the newest Microsoft Windows Operating System.



## **# 5 Improve Data Quality and Improve Data Entry Time**

Auto Complete features allow users to enter data more accurately and quickly in GoldMine Premium Edition. Now as you type the beginning letters of an entry in a field, the application offers up matching entries for you. Reporting is more consistent, as the application provides companies peace of mind about the overall quality of their data. Along with the obvious data quality benefits, the application improves overall user efficiencies with the 'quick' entry of data provided with the auto complete feature.



## # 6 Get Rid of That 'Lost' Feeling

GoldMine Premium Edition provides users with tools to enhance overall productivity. With the addition of a Contact Search box that remains in the navigation window regardless of where you are in the application, you can always find contacts quickly and easily. Imagine never having to tell a customer "Hold on while I pull up your record" again. We have also added a Recently Viewed items pane that provides links for quick data access. These features help your users stay on track regardless of any interruptions that they may encounter during the day.

The screenshot displays the FrontRange GoldMine Premium Edition interface for a contact named Brian Wright. The window title is "FrontRange GoldMine Premium Edition [Brian Wright]". The menu bar includes File, Edit, Go To, Tools, Actions, Schedule, Complete, Web, Window, and Help. The toolbar contains Search Center, Generate a Report, Timer, Prefs, Record, Edit, Stop, and Pause. The main navigation pane on the left includes a "Find Contact" search box, a "Recently Viewed" list, and a sidebar with buttons for Contacts, Activities, Calendar, Mail, Opportunities, Projects, Campaigns, Service, Leads, and Knowledge Base. The "Recently Viewed" list includes Brian Wright, Bob Anderson, Bea Detkoff, Art Bartoli, Lauren Hall, Donald Durst, Jessie Chow, and Iain John. The main content area shows contact details for Brian Wright, including company (Velocity Group), contact information (phone, fax, email, website), address (777 Main Street, Suite 200, San Francisco, CA 94100), and activity history (Next Activity: 3/5/2007 9:30 AM, Last Activity: 3/7/2007 11:20 AM). A "Relationships" pane at the bottom shows a hierarchy of contacts within the Velocity Group, including Brian Wright, Samantha Johnson, Kim Gustavo, Kurt Maloney, and Jessie Chow.

## # 7 Improve User Adoption

One of the biggest problems in a CRM implementation is trying to make sure that the application gets used. GoldMine Premium Edition provides configurability options for users so they can fine-tune the way their applications look. By providing drag and drop reordering of tabs as well as the ability to show and hide additional tabs, users can become more efficient with a few clicks of a button. Users will be able to select their best view of information for their daily business needs.



## # 8 Faster Grouping and Filtering

Users have always asked for quicker and easier ways to filter or group lists without having to run a separate report. Now in GoldMine Premium Edition, grid controls have been dramatically improved to provide robust grouping and filtering capabilities. You can now summarise information, further filter that information, or group information with a few clicks or drag and drop functionality. If you are headed to a particular city to meet with a contact, you can now quickly select the city name using the city filter, and get a complete view of contacts by city. This can all be done from within GoldMine Premium Edition, thus reducing dependencies on running additional reports.

State	Company	Contact	Phone1	City	Zip
+	State:				
+	State: AZ				
-	State: CA				
	American Bank	Art Bardoll	(310)555-3783	San Monica	90403
	Velocity Group	Bob Anderson	(415)555-7676	San Francisco	94102
	Velocity Group	Brian Wright	(415)555-9000	San Francisco	94100
	Smith & Jones LLP	Iain John Conyngsby	(213)555-1234	Los Angeles	90071
	Velocity Group	Jerry Smith	(415)555-6756	Berkeley	94555
	Velocity Group	Jessie Chow	(650)555-7778	San Mateo	94560
	Velocity Group	Kim Gustavo	(510)555-8998	Orinda	94200
	Velocity Group	Kurt Maloney	(510)555-8989	West Hills	94588
	Velocity Group	Samantha Johnson	(415)555-3456	San Francisco	94100
	Sue's Flower Shop	Sue Harner	(818)555-4567	Canoga Park	91364

Next Activity : 3/3/2007 10:00 AM    Last Activity : 2/25/2007 5:20 AM    Last Note : September 23, 1997 at 3:22pm [The "Notes" tab should only be use

Company: FrontRange Solutions Inc.    Phone 1: (800)786-7889    Ext:    Address: 1150 Kelly Johnson Boulevard  
 Contact: Lauren Hall    Phone 2: (800)709-3562    Ext: TS    Address:  
 Last: Hall    Phone 3: (800)654-3526    Ext:    City: Colorado Springs  
 Salutation:    Fax: (719)536-0620    Ext: Sales    State: CO  
 Dept: Sales    E-mail: suggestion@fronrange.com    Postal Code: 80920  
 Title: CEO    Web Site: http://www.fronrange.com    Country:

Contact Type: Other    Interest:    Open: Yes  
 Industry: Technology    Acct Mngr: F. Darling

Source: Internet

Common Contact Set    Num | Master    Friday, March 30, 2007    10:48am

## # 9 Enhanced Daily Activity Management

Having all customer information is handy, but all this information can also hinder your ability to work efficiently. In order to help streamline your daily business routine, the Daily Activity Management features of GoldMine Premium Edition have been enhanced. A powerful activity list tree has been added so users can quickly access open and closed activities, as well as email communications, all with the click of a button. Support for multiple alarms in one application window has also been included in Premium Edition. No longer will separate windows open up when multiple alarms come up in the application.

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