

CRM Software Review



Commence Corporation (732) 380-9100

Highlights

Customizable Dashboard
by job function

Color-coded customer
ranking and lead
qualification

Organization Chart

Flexible per user pricing



First Looks

Commence CRM is a comprehensive offering that rivals competitive products costing much more.

CRM applications include account and contact management, sales opportunity management forecasting, lead management, e-mail integration, marketing, customer service, a document library and project management. Commence also provides multiple levels of text based and graphical

reporting and includes an analytics package as well.

The product is cosmetically appealing with a clean user interface and a dashboard that enables the end user to manage every day functions with a single click such as, adding a new opportunity, a new lead, a service ticket or support call, a new project, or schedule a follow-up activity.

Navigation is quick and efficient making the product

very easy to use. The product's dashboard or home page is also customizable by person or job function. This allows each user to design the dashboard to the way they work.

Commence CRM is modular in design which allows customers to select only the applications they require for their business. You can begin with basic contact management then add departmental applications at any time.

Contact Management

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While the account and contact management applications are similar to most competitive products, Commence does offer a few unique features that companies will find compelling.

First, the database can be broken down into several independent mini databases. This allows you to manage your customers separately from vendors, suppliers, resellers or business partners for example. It's a nice feature that clearly has value

if you need to manage both customer and partner relationships. Information is also viewable on a single screen. There is no scrolling up and down to view data or flipping from screen to screen.

Secondly, the product includes an automated organization chart that graphically displays the reporting structure of each individual contact, along with their telephone number title and e-mail. This is a unique feature that allows

you to quickly identify the economic buyer and influencers within your accounts or new leads.

Commence CRM is also fully integrated with popular e-mail clients enabling the end user to continue to utilize their e-mail client of choice. E-mails can also be logged directly into the account and contract records within Commence CRM.



"Businesses can begin to segment their customers based on the value they provide to their business."

Customer Ranking

The most significant differentiator in the accounts and contact management application is the ability to rate and color code customers based on their value to your business. This simple, but clever feature enables sales and support staff to immediately identify their most valuable customers.

Red indicates the top rated ones followed by yellow and

blue. The rating criteria are completely customizable. Default criteria can be used right out of the box and include company size, revenue, fulfillment cost, service level requirements, profitability, future growth potential and customer retention.

The account rating feature along with the automated organization chart is a standard feature even in the

product's basic package and clearly differentiates Commence CRM from other account and contact management solutions.

Calendaring and Activity Management

The Activity Management application provides a quick snapshot of business activity and lists all appointments, calls or tasks for individual users. Commence makes it easy to view your activity by simply clicking on the Activities tab on the home page.

Shared calendaring is standard and allows employees to view and or write to each other's

calendars if they have permission to do so.

The calendar seamlessly integrates with MS Outlook and as such, mimics its capabilities with daily, weekly, monthly, and yearly calendar views. The integration is two-way so anything placed into MS Outlook will appear in Commence CRM and vice-versa.

The product also offers several pre-built reports such as activity by account, activity by end user and activity by product. These reports outline how often and the last time customers have been contacted. They are easily accessible from anywhere in the product with the proper security permissions.

Lead Management

The Lead Management application enables the sales team and management to capture, auto-assign, track and manage the life cycle and end result of every lead.

Commence CRM maintains

leads in a separate database. This makes sense for companies that import large numbers of leads from a third party service or directly from their web site through web forms.

Leads can be automatically assigned based on specific rules and placed into follow-up e-mail or direct mail campaigns if they are not immediately qualified.

Lead Qualification

Qualifying leads is an area where Commence CRM really shines. Incorporated within the lead management application is a lead ranking and scoring system.

Commence calls this feature an "automated business process" and it is similar to the customer ranking and color coding feature described earlier in the Accounts module.

The automated business process lets management

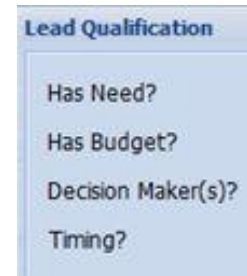
define a series of pre-qualification questions such as: (1) Does the prospect have a critical need? (2) Do they have a budget? (3) Are the decision makers known or engaged? (4) What is the time frame for a decision?

Once the questions are answered, the system automatically rates and color codes the lead as qualified or unqualified.

Qualified leads can be converted directly into the

sales system so that the sales team can begin to manage the sales cycle.

Unqualified leads remain in the lead database for continued follow-up via direct mail or e-mail marketing programs.



"Lead ranking ensures that sales representatives become laser focused on the most qualified leads."

Sales Management

The sales application provides a comprehensive solution for managing the entire sales process from introduction to closure and is very easy to use. Sales professionals can add notes or history items, attach documents, schedule follow-up activities or add additional sales opportunities all from a single screen.

The main sales dashboard displays a graphical analysis of each stage of the sales cycle followed by a spreadsheet style view below. Clicking on any

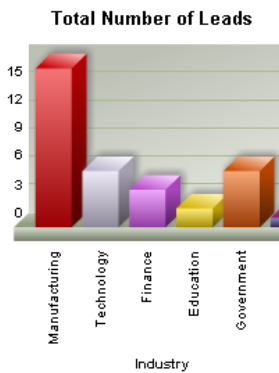
stage within the graph will display all opportunities in that stage. The spreadsheet below the graph enables immediate access to the complete detail of any opportunity with nothing more than a single click. An additional feature that sales professionals will also appreciate is the quick access to all pending, won or lost opportunities from the left side bar.

The biggest strength of this application is how easy it is for sales people to use. You can quickly implement a structured approach to

selling and managing the sales cycle using standard sales methodologies such as Sandler Systems, Dale Carnegie or Miller Heiman. Of course you can also enter your own custom sales methodology if you choose.



"The Sales dashboard lets you drill into each opportunity in any stage of the sales cycle"



"Marketing analytics help you target leads by industry or by source."

Marketing Management

The Marketing application offers two levels of functionality: mail merge and drip marketing.

The mail merge feature gives sales staff the ability to send personalized e-mails or marketing materials to their prospects and customers. The mail merge feature allows you to create text-based e-mails, printed

letters and labels or HTML mailers which can then be sent to specific contacts or leads. It is easy to use and a welcome tool for sales people who want to manage their communication with customers and prospects.

For the marketing department Commence CRM offers an automated drip marketing feature. Drip

marketing allows you to establish a set of pre-defined marketing campaigns and time tables for their release. This enables marketing professionals to schedule multiple e-mail or direct mail campaigns weeks or months in advance.

Customer Service

The Customer Service and Support application is a help desk and ticketing system that is fully integrated to the account record. It enables all authorized personnel to see the complete service history of a customer.

Each service ticket includes details such as who took the call or inquiry, who manages

the account, is the ticket still open or closed, has it been escalated and whether the customer was satisfied with the result.

The main customer support screen provides managers with a graphical view of all support tickets including tickets by age and tickets by representative. Support call

details are stored separately from general notes and history making it easy to quickly review a customer's service history.

A searchable knowledgebase and FAQ is also built-in to the Customer Support system. A customer portal is planned for the future.

Project Management

Another unique capability within Commence CRM is the integration of a Project Management Application. This is a rare find in even enterprise level systems, and demonstrates that Commence is a serious contender in the mid-market sector where this type of functionality is often of significant interest. While

the project application does not offer any Gantt charting or graphical analytics it does a good job of allowing you to define a project, establish the project tasks, assign tasks, responsibilities and due dates, and create time slips for billing purposes.

It's not as robust as stand-alone project management

systems, but it's a nice addition if you need to manage and integrate projects with your CRM database.

Document Library

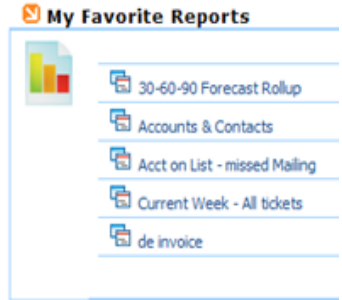
Incorporated within Commence CRM is a document library. The Documents application stores and provides access to important documents that employees often require when selling and supporting customers.

Public folders may include such things as a product catalog, price guide,

technical specifications, implementation or best practices guides, standard proposals, customer testimonials or brochures.

Customer-specific documents, such as contracts and scanned documents, can be uploaded securely. These are attached to the account record so that authorized employees

can see what information has been filed for prospects and customers.



"Direct access to your favorite reports directly on your dashboard"

Reporting & Analytics

Reporting is a key component of any CRM system and Commence CRM offers a full complement of pre-built text based and graphical reporting. The Report application includes approximately 60 pre-built point and click reports across the applications.

The reports are accessible from the product's home page, and many of the reports are customizable. A built-in report generator allows you to create custom reports against standard fields as well as custom fields. This provides a wide range of flexibility for data mining.

An additional level of reporting via the analytics package offers a series of graphical reports for sales, marketing and customer service. The analytics are real time and provide management with immediate access to data and graphical reports.

Mobile

Commence is an online CRM system that operates over the Internet and offers full mobile access via any Internet browser. As such, access to customer data is available 24/7 from any smartphone or tablet PC.

to respond immediately to new sales opportunities or requests for service. Mobile access is currently included within the monthly service fees thereby adding additional value to the offering.

This mobile support enables sales and support personnel



"Administrators can add custom fields to track unique business information."

Customizability

Each application within Commence can be customized to meet unique business requirements.

Application customizations are accessible to **system administrators** from the administrator's dashboard. Creating custom views, adding custom fields, adding drop-down boxes and

connections can be done within the dashboard. This lets an administrator tailor the product without programmer intervention.

End users can also personalize their home dashboard to the way they work, create saved searches and build ad-hoc reports.

Any significant system changes or integration with disparate systems requires development expertise.

System Platform & Data Security

Commence CRM has been designed using industry standard components that have proven to offer scalability and a high level of performance. The system is an SQL-based solution operating on a Java Platform. This is the same technology platform used by enterprise level programs supporting very large

numbers of users and high transaction volumes.

One of the most overlooked yet critical aspects of hosted or cloud based CRM software is where your data is stored and managed. Commence has a strategic business alliance with Rackspace a tier 1 hosting provider that is highly

regarded for providing world-class service and data protection. This places Commence CRM among the top offerings for data security and protection.

About Commence Corporation

Commence is a leading provider of Customer Relationship Management software and delivers a diverse suite of business applications that integrate people, processes and technology. The company has been providing customer management software for more than two decades and has an outstanding track

record for its award winning products and world-class customer service.

Commence CRM is utilized by several thousand businesses to streamline the internal business processes that impact sales execution and customer service. Commence was the original developer of IBM Current, a

contact management system and its products have also been sold under private label agreements with companies such as Compaq Computer and Lucent Technologies. Commence customers have experienced an increase in workforce productivity, generated positive customer interactions and reduced operational cost.