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PiSA sales Questionnaire Module

Fair reports, visit reports, online surveys etc.

The Questionnaire Module in the PiSA sales CRM will help you to generate simply structured questionnaires and make them available for purposes of all kind. Typical uses are visit reports for sales and service, fair reporting by marketing, telephone guidelines, or customer-satisfaction analyses. The pre-prepared questionnaires can be made available to your staff for the quick collection of information or can be posted on the Internet as an information-submission template. You can program the system to either personalize the responses collected in a given context or to store them as anonymized results in the CRM database, where they will be retrievable for comprehensive analysis.

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The benefits of this module in the PiSA sales CRM include:

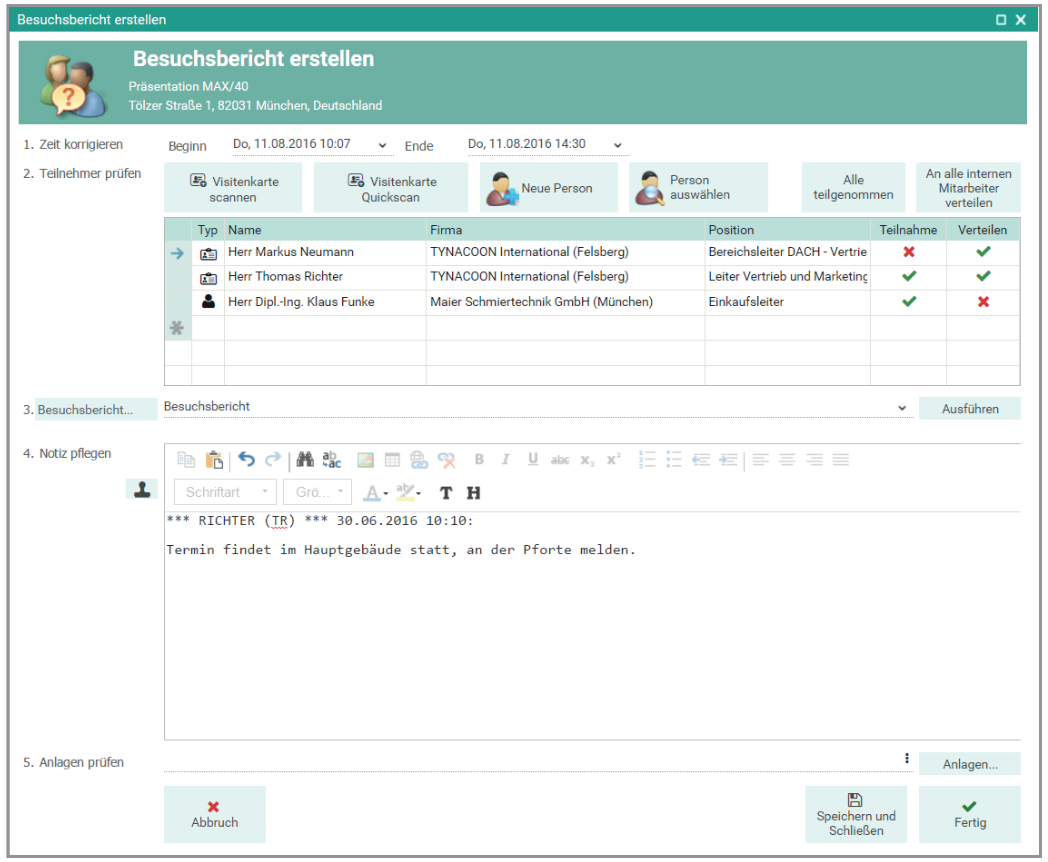
- quick capture of contact data and fair reports, on location and with the help of a user assistant
- on-site preparation of contact reports
- definition of a guideline for phone contacts and the generation of call reports
- capture of information of any kind for a contact or process (e.g. information on po tentials, customer requirements, or customer satisfaction)
- customer-satisfaction analysis and customer surveys via web portal

A highly value-creating module

Because it is so versatile and has such a huge array of functionalities for different areas of application, the Questionnaire Module provides a broad spectrum of added value for data-collection operations, the management of downstream processes, and the analysis of information gathered.

Visit reports

The questionnaires you create will lead your field staff through their meetings with customers, making their talks more focused and effective. To provide your operatives a quick overview ahead of their meetings, key information about a customer can be compactly provided in a visit report. The system can automatically generate follow-ups and to-do lists based on the hard and soft facts, the concrete customer requirements, or the ordering particulars ascertained at a meeting and will then delegate those tasks and processes accordingly. Analysis of the data collected will help supervisors to better manage and coordinate field activities and identify revenue potential.



Visit report assistant

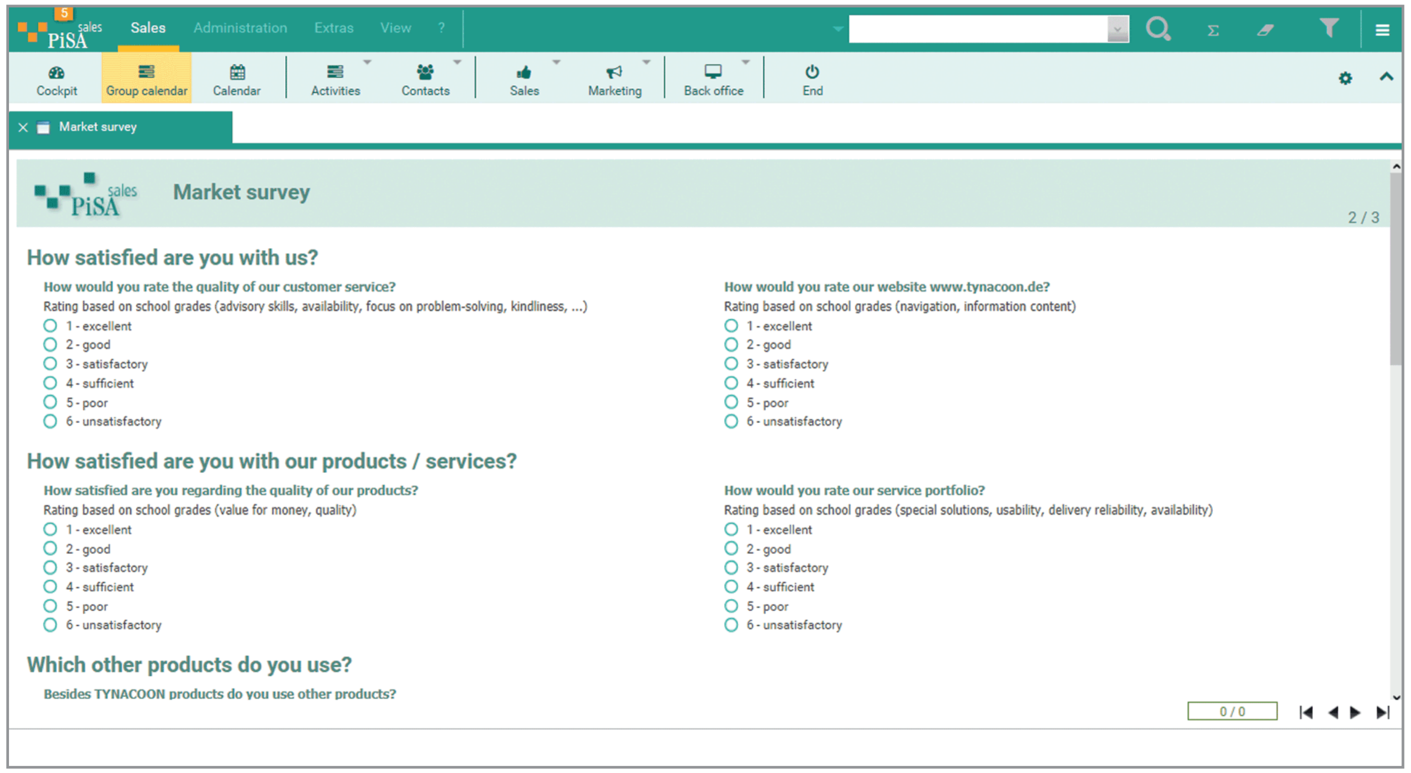
Fair reports

Questionnaire templates will allow the staff working an exhibition to easily feed information on contact-specific requirements and interests into the system. A user assistant will help to create appointments and easily allocate contacts (possibly using a business-card scanner for quick-fire data collection).

The module automatically produces a follow-up to-do list (e.g. for in-house staff or account managers) based on the input provided, thereby ensuring that all event and contact processing is immediately initiated.

Telephone guidelines and call reports

Telephone guidelines can be made available for each contact call initiated as part of telemarketing campaigns. These questionnaires will provide an interactive dialog lead for conducting the call and will record the contact's information and responses. The call reports thus generated may subsequently be evaluated concerning the corresponding contact person. The system, for its part, will automatically generate a follow-up to-do list and delegate tasks, e.g. to the letter shop. As a result, post-processing times per contact will be radically reduced, and the responses provided by the contact will be available for thorough analysis.



Example of a visit report

Customer-satisfaction analysis

The module will allow you to prepare questionnaires for the assessment of training events, the conducting of classic satisfaction analyses in marketing, or for web-based surveying. Respondents will complete their personal questionnaires via a PiSA sales web client, entering their answers to the questions straight into the CRM system. The system will automatically allocate a campaign participation status to the contact once they have completed the web form.

The results of your survey or inquiry will be automatically allocated to the related survey file, where they will be immediately available for analysis. Tasks can be automatically generated, to the respective account manager, for example, or to the customer-service unit, depending on the response solicited (e.g. "customer dissatisfied").

Questionnaires at a contact or a case

You can create questionnaires for individual contacts or processes, such as business opportunities or quotes, for you to complete either as a one-off exercise or on a periodic basis. This will allow you to collect or update data on potentials or other dynamic information relating to a customer or potential customer and to define the focus of that information. Real-time information from the database may be used in these questionnaires. Conversely, updates can be fed back into the database. Such information may concern the number of employ-ees at a company or the volume of revenue it generated in the previous year.

Comprehensively evaluating questionnaires

Analysis of the data collected transpires using the extensive reporting and analysis options provided in PiSA sales CRM. There is practically no limit to the kind and quantity of information you might wish to collect. The flexibility of the analysis options at your disposal will enable you to gain valuable insight into any defined area of interest.

Easy creation of questionnaires

The Questionnaire Module will help you to prepare your questionnaires with a comprehensive range of layout and navigation options to accommodate specific theme areas or objectives - completely without required programming skills.

The predefined elements contained in this module will help you to create a suitable layout (in keeping with your corporate design) and appropriate data-entry fields. You will determine the agenda for your questionnaire and formulate your questions and response options accordingly. A variety of options is available to you for determining a predefined course of navigation through a questionnaire depending on the answer provided to a specific question.

We will be pleased to advise you!

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