# CRM SOLUTION TO EXCEED EXPECTATIONS

captavia™
EXCEED EXPECTATIONS

Your organisation needs to connect to your customers through increasingly effective and efficient ways. It is clear that you need customer relationship management but do you need CRM? CRM software does not perform customer relationship management - people bring CRM to life but all too often the systems demand process and behavioural changes that hamper success. Captavia™ delivers a software solution to the business that augments your already excellent reputation for customer service in all its guises. Captavia™ provides enhanced capture, tracking and delivery capabilities to your organisation in a powerful, yet simple to use package. It is designed to address your belief that the technology supports your CRM philosophy rather than the other way around.

Inisoft is a leading supplier of CRM solutions to customer facing organisations supporting business and skills development. Our reputation is founded upon the supply of low Total Cost of Ownership solutions with product and service flexibility that reflect the changing needs of our customers. Captavia™ adapts to your customers' increasing expectations by providing you with the capabilities to simply define and modify users screens and workflow processes at multiple levels from organisational through departments, teams and individuals. By delivering customised screens that reflect the exact requirement of the individual users Captavia™ provides unprecedented user adoption rates.

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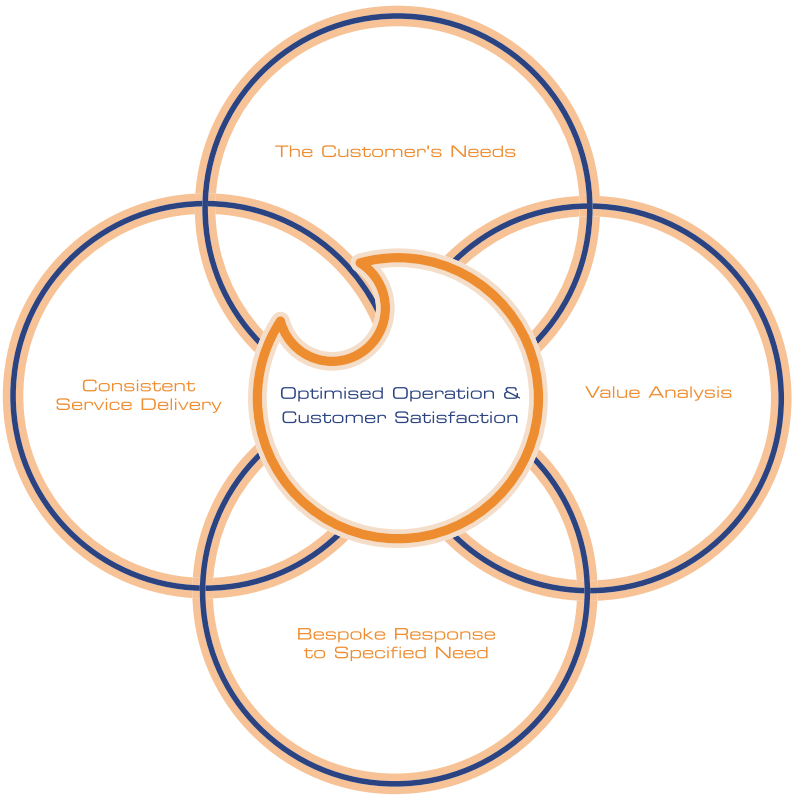
The demand for improved levels of customer service will never diminish and technology has a key role to play in allowing you to satisfy that need. The links between all aspects of product/service delivery must therefore be strengthened, streamlined and made transparent from front line staff contact throughout brokered service delivery. Captavia™ provides this connectivity and illuminates the collaborative touch points throughout your organisation. Customers benefit from your detailed and shared knowledge of their needs.

A customer centric CRM ensures that your organisation can identify and respond to your customer's requirements in a consistent and personalised way.

## What does CRM mean to your organisation?




## How can Captavia™ support your CRM objectives?

Born out of economic development business support, Captavia™ supports customer management across Local Authorities, membership organisations, business and training support organisations and their delivery partners.

As the leading CRM system deployed throughout the business support community, Captavia™ excels in the delivery of business activities such as information provision, marketing, sales, delivery management and performance measurement. Captavia™ provides access to comprehensive key performance indicator monitoring.

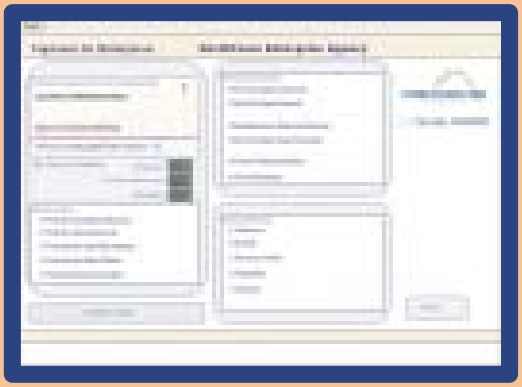
Captavia™ can be deployed over the web, on a conventional PC or as a hosted solution allowing you to select the best deployment option for your company or departmental needs.

Captavia™ is designed to ensure that you can achieve your business goals through capturing and presenting information that measures, guides and directs the actions of your teams in meeting the needs of your customers.

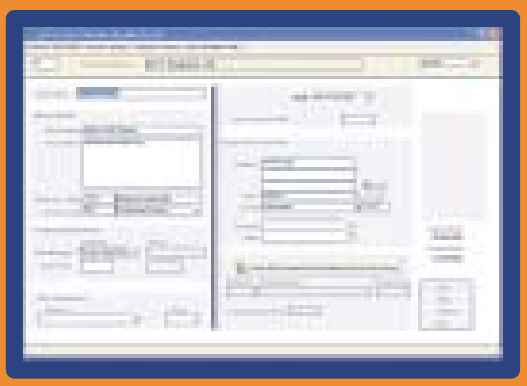
Captavia™ with its open architecture and powerful integration capabilities allows you to access and interact with information from your existing systems to maximise the return on investment (ROI) while protecting the investment in your existing infrastructure.

What makes Captavia™ so successful is the manner in which it engages users, enhances your capabilities and connects these to your customers' requirements. Captavia™ is designed to support the brokerage based client support model, where any or all capabilities can be made available to all parties enhancing the relationship with partners and suppliers to your customers.

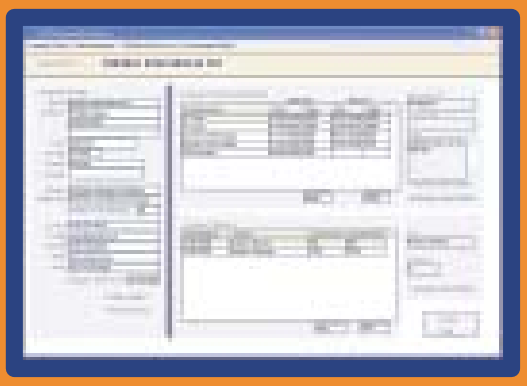
There are considerable benefits of implementing a shared CRM system, both for the partnership and for the customer. Having a clear view on the partner contact activity with the customer will eliminate service duplication and provide a means to promote cross selling of complimentary services.



Captavia™ approaches the design of the CRM from a straight forward perspective – yours. While Captavia™ supplies predefined CRM functionality, the Captavia™ Studio delivers the capability to create screens tailored to support maximum use by your staff while ensuring that organisational and customer needs are connected in the most effective way.



The Captavia™ process support ensures consistent handling of even relatively infrequent activities. Delivery of CRM goes beyond screen design. Workflow and process design are also critical to ensuring high adoption rates, fast access to information and delivering a customer experience that is as smooth and as tailored as possible.



The Captavia™ Studio includes a highly graphical, workflow process builder that allows you to map the implementation to your existing and future business processes. Extensive use of the process builder also significantly reduces training requirements as Captavia™ automatically guides your staff, partners or customers through the necessary screens to enter or view the required information.

This 'total flexibility' allows for creativity in system design to closely bind the system to the user's needs, ensuring that your own processes and systems are highly personal, streamlined and customer centric.

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