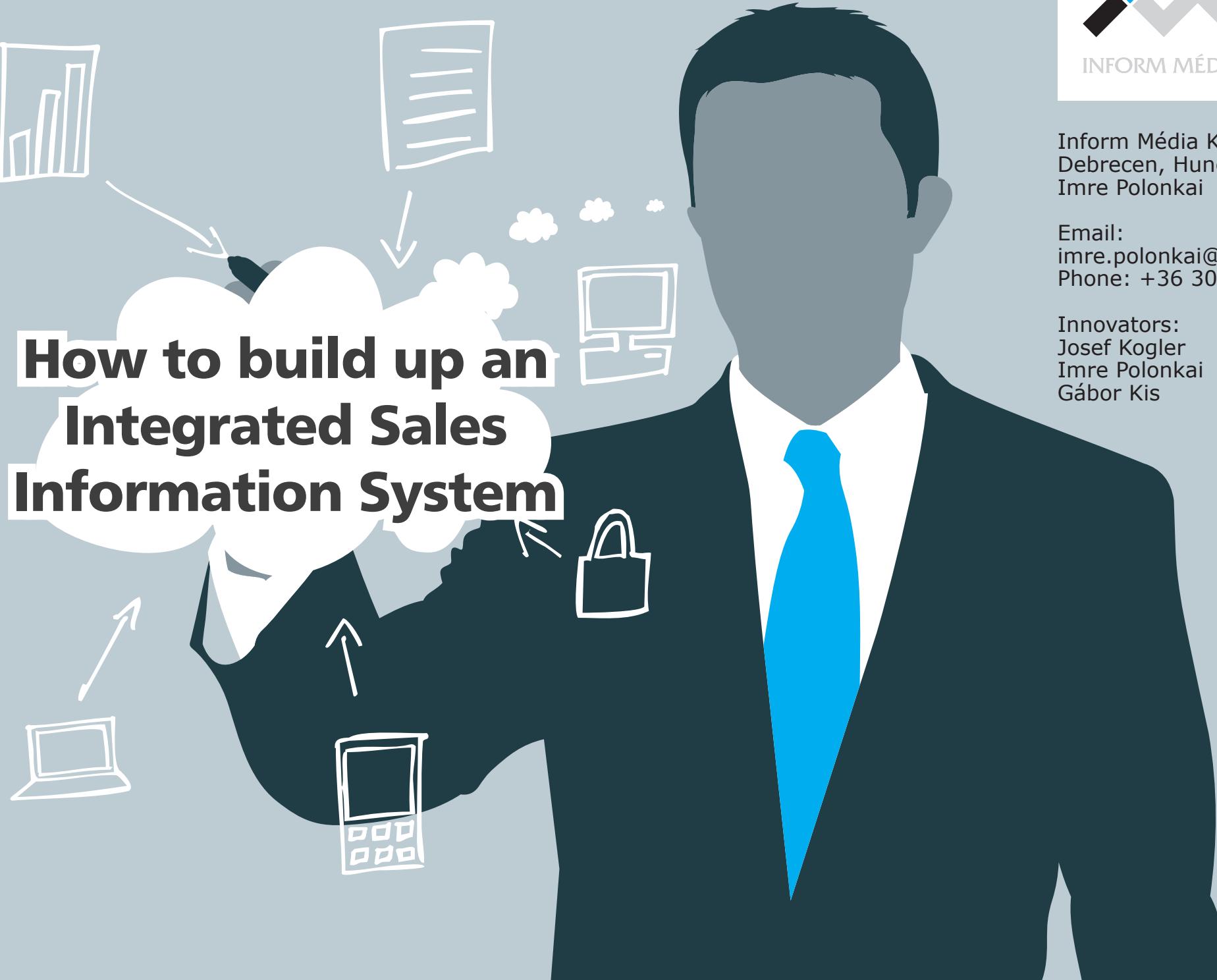


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How to build up an Integrated Sales Information System



The Problem



- Inform Media had 9 different client databases for its departments working on the same market
- Different IT systems separately without no communication → double stored data, manually work
- No transparency
- It was difficult to track what sales are doing, but the results
- Sales jumped between systems to find information

The Strategy

Build up a Sales Information System which integrates all client related data into one place

To have:

Productive Automated →

Integrated →

Clean →

Transparent →

Comprehensive →

For:

→ Sales reps.

→ Sales management

→ Management



The Solution



- Implement an open source CRM which is a flexible to expand
- Clean up all client databases from duplicates
- Merge 9 client databases into one
- Develop new modules in CRM to store all client related data
- Develop APIs between systems
- Connect CRM to phone center for auto dyaling
- Design CRM layout to save more time to sell
- Develop real-time reports for users
- Automatised sales workflow supported by CRM

Rules

- Reps should use 100% CRM the whole day
- What is not in CRM does not exist
- Commission paid after orders in CRM

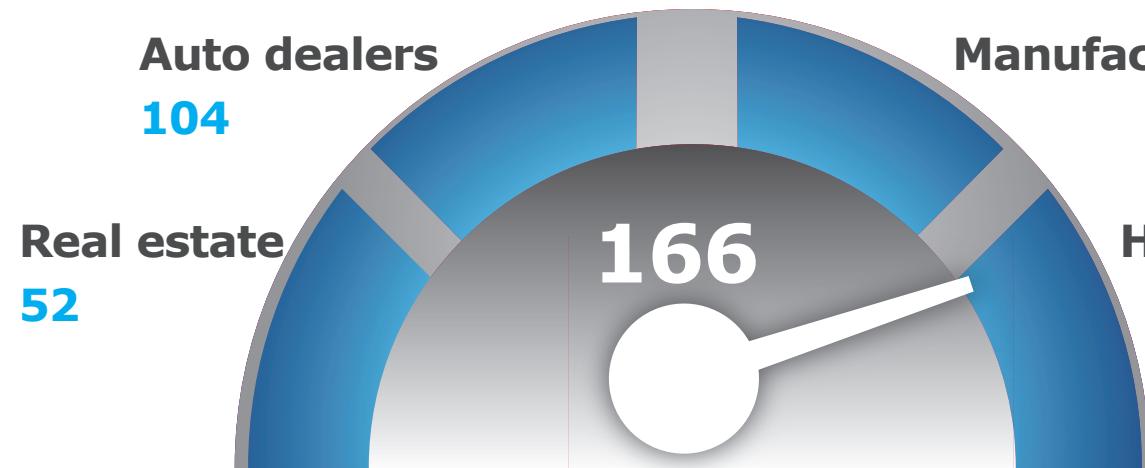
The screenshot displays the SugarCRM interface. The main window shows a 'Client name' record for 'Op Faltering Kozmetikai Zrt.' with various fields like VAT number, Branch, Rating, and contact information. Below this, the 'Address Information' section shows 'Billing address' and 'Shipping address' for the same entity. The 'Email Address' section lists 'Primary email address' and 'Alternative email address'. The 'Description Information' section contains a note in Hungarian. The 'Additional Details' section includes fields for 'Organization', 'Region/Office', and 'ID_CRM_USER'. The bottom part of the screenshot shows a 'Contact history' list and a 'Contact person(s)' list, both of which are empty.

The Results



- Improve client database quality by 40%
- Whole sales workflow expanded with receivable management is supported by only one system
- Saved 20% of time of the sales reps → means 300-350 more prospects to call for the company by week → 15-20 orders more weekly
- Management has real time reports what their team is doing the whole day
- Targets vs Facts
- Trackable where the sales process is stucked

Revenues by industries



Pipeline

