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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

→ Manager



Information System



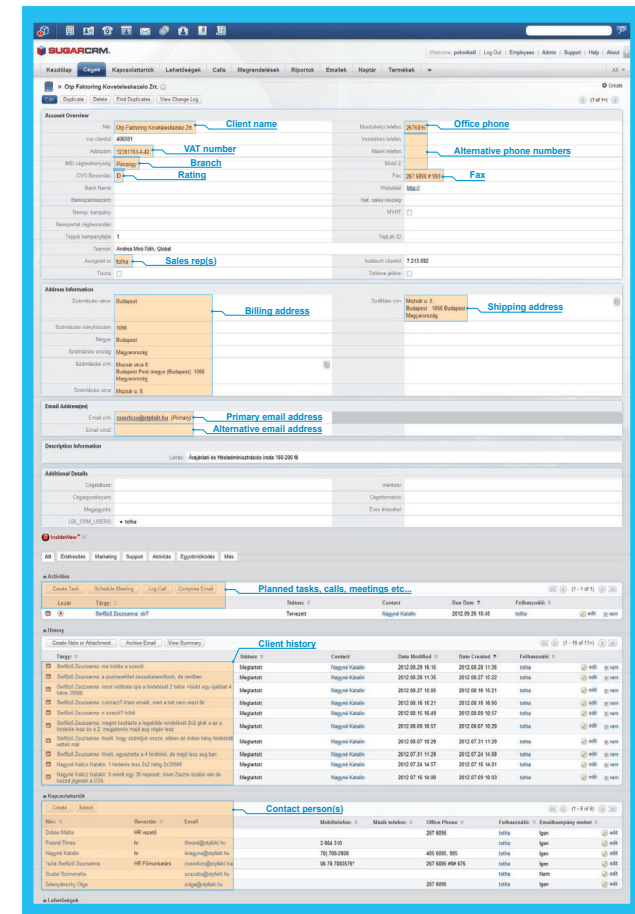
The Solution



- 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 dialing
- 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

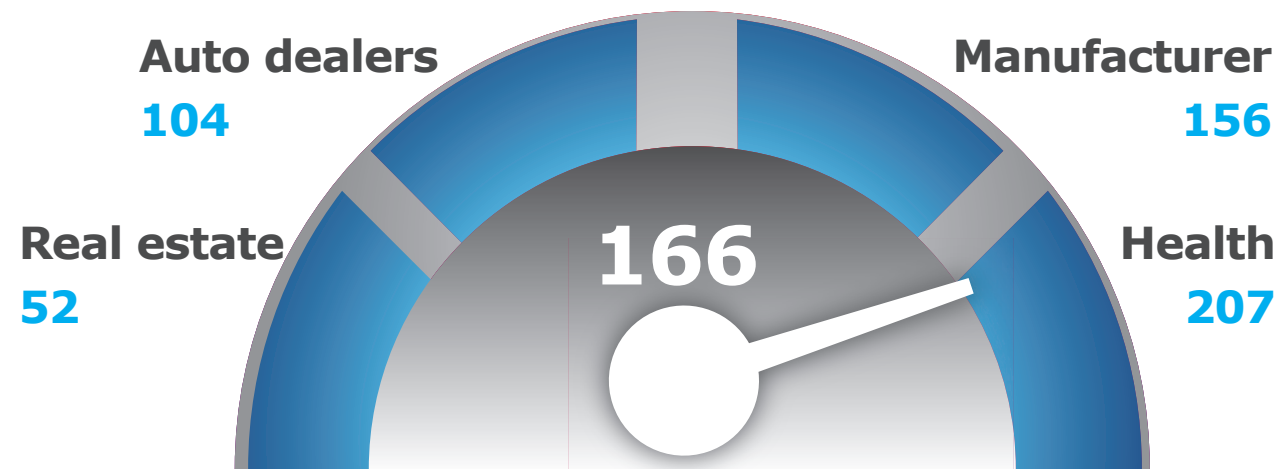


The Results



- 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 stuck

Revenues by industries



Pipeline

