

OneCX CRM 360°

Unified solution for Dealers, Distributors, Sales and Service Teams

User Challenges ...

How do we...

..compete with small players for aftermarket sales

.. ... get **customer 360-degree view** on orders, invoices, account details?

..customer financial analytics by BUs, Product Lines,



Sales/ Service Manager

I wish I had...

Quick and easy Quote/ Ordering for Spares as well as Configured Parts

Personalized Content, Pricing

Anytime Anywhere Status of my Quote or Order

...automated Field Service job scheduling

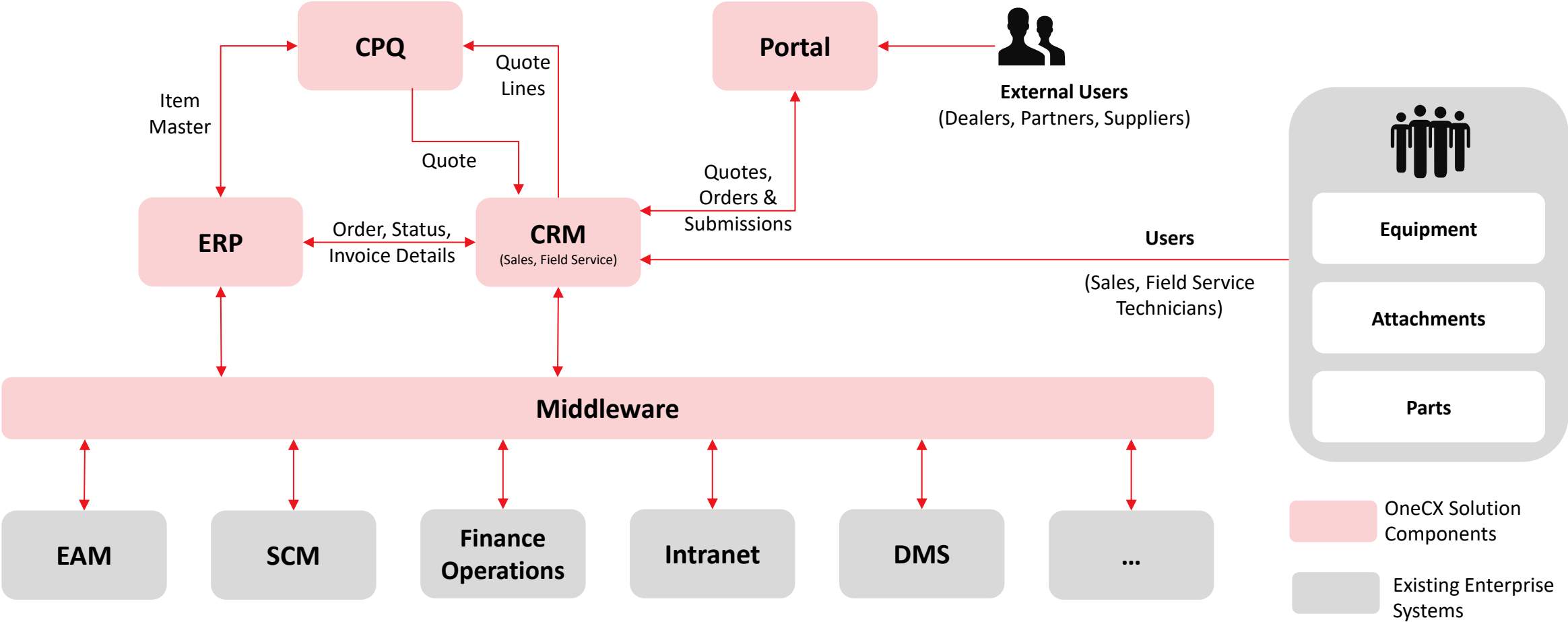


B2B End Users (Dealers, Distributors, Suppliers)

Key Business Challenges and Objectives Addressed

- Provide seamless experience to dealerships, distributors and other users
- Multiple, unlinked systems make providing customer order information difficult and inefficient
- Lack of one-stop shop for all quotes/orders across BUs & Product Lines
- Quick and easy Quote/Ordering for Spares as well as Configured Parts
- Limited customer 360-degree view on orders, invoices, account details
- Customer financial analytics by BUs, Product Lines
- Drive revenue growth in aftermarket parts & services
- Ease of rollouts to other business divisions & geographic regions

OneCX CRM 360° Solution View

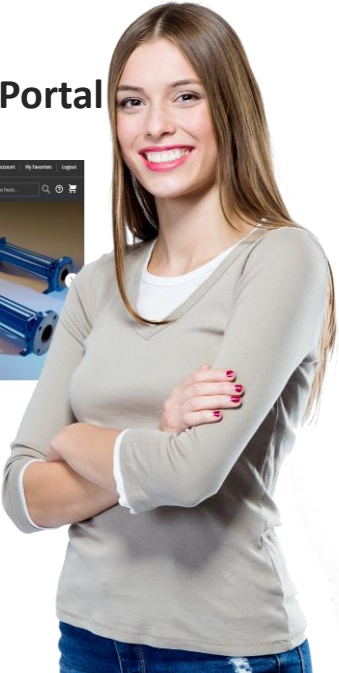
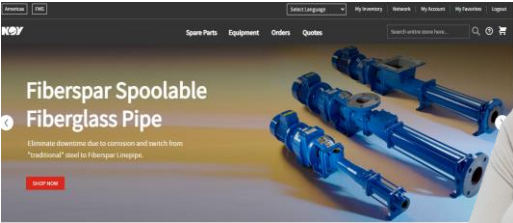


OneCX CRM 360° Solution Considerations

- ✓ Consolidated single CRM for all the Sales and Field Service business process to provide single source of truth
- ✓ Single CPQ engine for managing all the quote configurations
- ✓ Implementation of Dealer and Distributor portal for orders and services
- ✓ Portal for external users (partner network, dealers, etc.), integrated with the CRM instance
- ✓ Offer consistent & improved Customer Experience across Products Lines
- ✓ Designing base framework of CRM, ERP, CPQ and Portal that can further be leveraged and extended for any rollout- for additional product lines, BUs

User Persona based Approach for Dealer Portals and Sales Fulfillment

1. Dealer eCommerce Portal

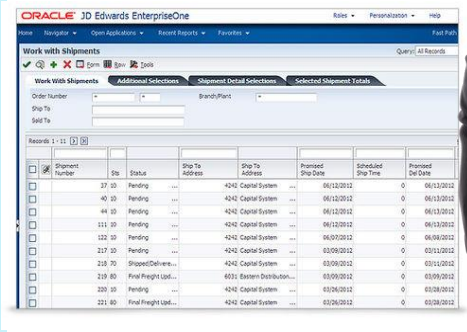


Integration

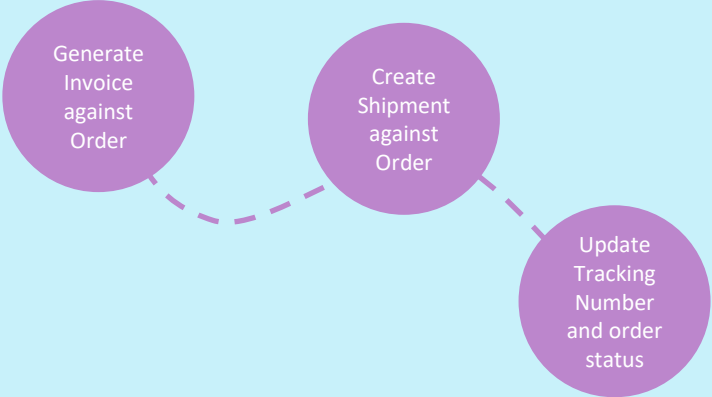
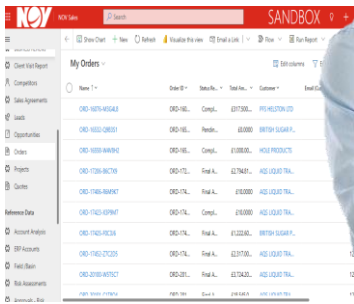


Stock Check
Price/Discount
Check
Create Sales Order

2. Order Fulfillment Manger in ERP



3. CSR in CRM



OneCX CRM 360° Solution Benefits

- Improved revenue by eliminating revenue leakages and providing insights around E2E sales process for dealers, distributors and sales team
- Enterprise scale dealer/distributor portals to drive growth & efficiency
- CX at the core strategy significantly improved Customer Experience and the Satisfaction scores for users; with CRM as Single Source of Truth
- Improved efficiency via streamlined processes, reduced cost of operations and time across all functions
- Scalable solution for adoption and ease of onboarding of new business across product lines and geographies
- Global template driven approach to ensure ease of rollout to other divisions & regions.
- Improved Order & Quote processes Resulting in Better DSO
- 360° Visibility Across Business Processes

