



5 PROVEN CRM BENEFITS FOR MANUFACTURERS & DISTRIBUTORS

Unlocking New Sales Potential with Creatio





Creatio

Put your customers at the heart of your processes, gain a edge over your competition, unlock new sales potential, and grow your profits.

Creatio offers sophisticated tools to manage manufacturing and wholesale distribution through multiple sales channels: direct and channel sales, e-commerce, field sales and POS, maintain product catalog and manage orders. With Creatio all-in-one industry-tailored solution manufacturing and distribution companies can benefit from automating key business processes thanks to the tools for efficient sales, service and marketing management, procurement and supply chain management, inventory planning, and document flow automation. This guide presents 5 proven CRM benefits for manufacturers and distributors and explores how you can unlock new sales potential with a flexible cloud CRM platform, like Creatio.



01

PREDICTIVE SALES INTELLIGENCE

With all its benefits, CRM and predictive sales intelligence make it possible to create an entire universe of business apps to deliver smarter customer experiences across all sales interactions. One of the core parts of the sales process is that intelligent sales force automation with CRM's AI capabilities is capable of streamlining the entire lead management process. CRM allows for more intelligent and unified sales and marketing efforts. This includes predictive lead scoring, intelligent lead routing, and deal intelligence. Equip your sales team and your sales leaders with tools to make smarter business decisions and forecast sales with 10x more accuracy. Build real-time sales funnels and gain insight into your close ratios.

Creatio Tip: Leverage predictive sales forecasting to get an intelligent estimate of what to expect for quarterly or yearly sales instead of just relying on intuition. Predictive forecasts are based on historical sales performance as well as the current state of the pipeline.

CREATIO FEATURE BENEFITS

- Sales forecasting
- Real-time reporting and dashboards
- Close-ratio analysis
- Opportunity and pipeline probabilities
- Custom goals, KPIs, and alerts
- Easy-to-customize reports
- Demand planning



80% of executives believe sales intelligence and reporting improves worker performance and helps exceed sales quotas.

Creatio

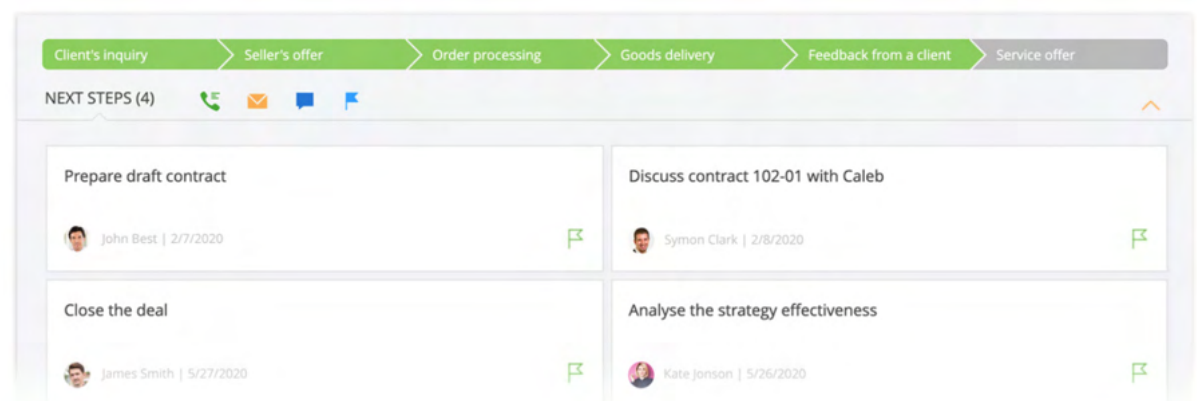
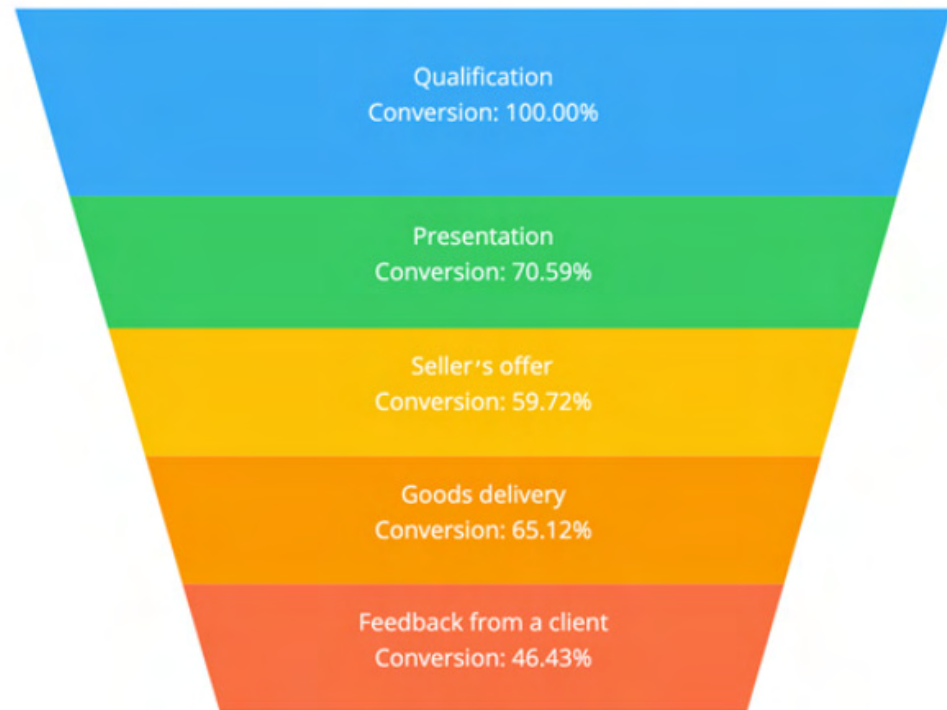
01

PREDICTIVE SALES INTELLIGENCE

NUMBER OF OPPORTUNITIES

STAGE CONVERSION RATE

PIPELINE CONVERSION



Creatio



02

STRONG CUSTOMER RELATIONSHIPS

Leveraging technology to make the most out of your customer data. Consumer behavior and expectations continue to evolve. Customer service has always been important but has now shifted focus to a streamlined customer experience. Buyers expect rapid turnaround on deliverables, timely response, and thoughtful check-ins. Your clients want a relationship and expect to be more than just a sale. Having easy access to customer information, as well as the ability to log customer interactions, track past orders, and easily address concerns, service requests, and reorders is critical. To be successful in building client relationships, your customer data needs to be clean, up-to-date, and accessible for sales reps, account managers, front office, and back-office team members.

Clean data allows your team the opportunity to visualize each client to reveal new insights. Sometimes these insights can be a service opportunity, upsell, or cross sell which means more revenue to your business. But oftentimes, it allows team members to identify risks, client challenges, missed service requests, or an opportunity to go above and beyond for a client. Quickly identifying opportunity (good or bad) and being proactive with customers is an outstanding way to build trust and longevity.

CREATIO FEATURE BENEFITS

- Customer data management
- Loyalty program management
- Comprehensive needs analysis
- Contract management and alerts
- Opportunity management
- Contact management
- Order and invoice management
- Service and support requests
- Upsell and cross sell analysis

23x - Data-driven organizations are 23 times more likely to acquire customers, 6 times as likely to retain customers, and 19 times as likely to be profitable as a result.



02

STRONGER CUSTOMER RELATIONSHIPS

The screenshot displays the Creatio CRM interface for a customer profile. The profile is for Alice Phillips, a Managing Partner at Streamline Development. The interface includes a sidebar with navigation icons, a top bar with the Creatio logo and a search bar, and a main content area with tabs for CONTACT INFO, MY CASES, HR STATISTICS, FINANCES, CURRENT EMPLOYMENT, MAINTENANCE, TIMELINE, and HISTORY. The CONTACT INFO tab is active, showing details such as full name, title, mobile and business phone numbers, email, and account information. A progress bar indicates 90% completion. The NEXT STEPS section shows four steps. The CONTACT INFO section includes fields for Type (Customer), Title (Ms.), Recipient's name (Phillips), Age (0), Gender (Female), and Preferred language. The ADDRESSES section shows a primary shipping address: 83 Sunrise Street, Liverpool, United Kingdom. The NOTWORTHY EVENTS section shows a birthday on 9/17/1982. The CONNECTED TO section shows a relationship with Alexander Wilson, a former employee and friend.

Alice Phillips

SAVE CANCEL ACTIONS RUN PROCESS VIEW

What can I do for you?

90%

1:16 PM, Liverpool

Full name* Alice Phillips

Full job title Managing Partner

Mobile phone +44 (782) 204 5477

Business phone +44 (15) 1440 5222

Email alice.phillips@streamdev.co.uk

Account Streamline Development

Type Customer

Owner Mary King

Web www.streamlinedev.com

Primary phone

NEXT STEPS (4)

CONTACT INFO MY CASES HR STATISTICS FINANCES CURRENT EMPLOYMENT MAINTENANCE TIMELINE HISTORY

Type Customer

Title Ms.

Recipient's name Phillips

Age 0

Owner Megan Lewis

Gender Female

Preferred language

Addresses

Address type Primary

Shipping Yes

Address 83 Sunrise Street

City Liverpool

Country United Kingdom

ZIP/postal code

Noteworthy events

Type

Birthday 9/17/1982

Connected to

Related object Alpha Business

Relationship type Former employee

Alexander Wilson Friend

The screenshot displays the Creatio CRM interface with a calendar and an appreciation letter. The calendar shows tasks for the week of May 9th to 14th, 2016. Tasks include Streamline development, Prepare the quote for Global Ventures, Streamline Development prepare and send quote, Alpha Business: Settin a, Gateway: meeting with bob and Sarah, Prepare materials for training on Saturday, Playing golf with Jason from AlphaBusiness, Weekly report, Check certification the, Softline: Webinar, and Training on B2B sales. An appreciation letter is open, addressed to Alexander Wilson, thanking him for his assistance. The letter is dated 9/9/2016 and includes a 'MARK AS PROCESSED' button. The interface also shows a sidebar with navigation icons, a top bar with the Creatio logo and a search bar, and a main content area with tabs for CONTACT INFO, MY CASES, HR STATISTICS, FINANCES, CURRENT EMPLOYMENT, MAINTENANCE, TIMELINE, and HISTORY. The CONTACT INFO tab is active, showing details such as full name, title, mobile and business phone numbers, email, and account information. A progress bar indicates 90% completion. The NEXT STEPS section shows four steps. The CONTACT INFO section includes fields for Type (Customer), Title (Ms.), Recipient's name (Phillips), Age (0), Gender (Female), and Preferred language. The ADDRESSES section shows a primary shipping address: 83 Sunrise Street, Liverpool, United Kingdom. The NOTWORTHY EVENTS section shows a birthday on 9/17/1982. The CONNECTED TO section shows a relationship with Alexander Wilson, a former employee and friend.

Calendar

Streamline development

Prepare the quote for Global Ventures

Streamline Development prepare and send quote

Alpha Business: Settin a

Gateway: meeting with bob and Sarah

Prepare materials for training on Saturday

Playing golf with Jason from AlphaBusiness

Weekly report

Check certification the

Softline: Webinar

Training on B2B sales

Incoming - Not processed

Dear John, As one of your customers, I wanted to say thank you for the assistance you gave me in p

Alexander Wilson

Alpha Business

351

017 / Alpha Business / Package

Bind to Activity

MARK AS PROCESSED

Barber Andrew

FW: Appointment confirmation

Dear Mr. Best, Thank you for the letter. See you on Tuesday. Yours truly, Andrew Barber From: John

noreply-daa26fef@plus.google.com

started on Google+

Creatio



03

EFFECTIVE DISTRIBUTION MANAGEMENT

With Creatio, you have the ability to unify marketing and sales efforts as well as create and deploy effective marketing campaigns. But these campaigns can only be effective if all of your team members are on the same page. With CRM, you have one source of the truth when it comes to customer communication, marketing campaigns, and sales efforts. This becomes especially important when customers call in through the front lines or start a support ticket, it's important to have visibility into every step of the customer journey.

Where this also becomes an effective tool is for streamlining vendor communications, issuing quotes, performing stock inquiries, or looking up item availability. When you are selling through multiple sales channels, having a central storage for your information is critical. This streamlines order fulfillment times, provides a better route for customer service requests, and improves vendor relationships. Above all of that, you are also able to provide more reliable reporting to key stakeholders and perform in-depth analysis of your orders, your sales volumes, your metrics, your client satisfaction and more. CRM automates mundane paper tasks and allows you to focus on fine tuning new areas of the business.

CREATIO FEATURE BENEFITS

- Quote and price management
- Comprehensive needs analysis
- Vendor management
- Distribution - multiple sales channels
- Order management and tracking
- Field sales and service
- Document management
- Flexible quote to invoice process

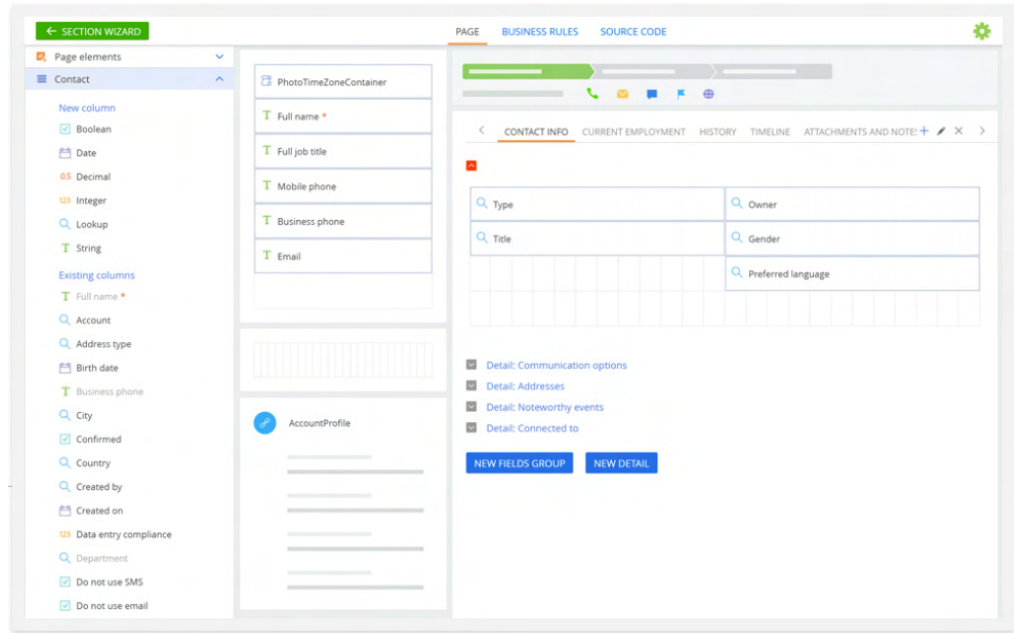
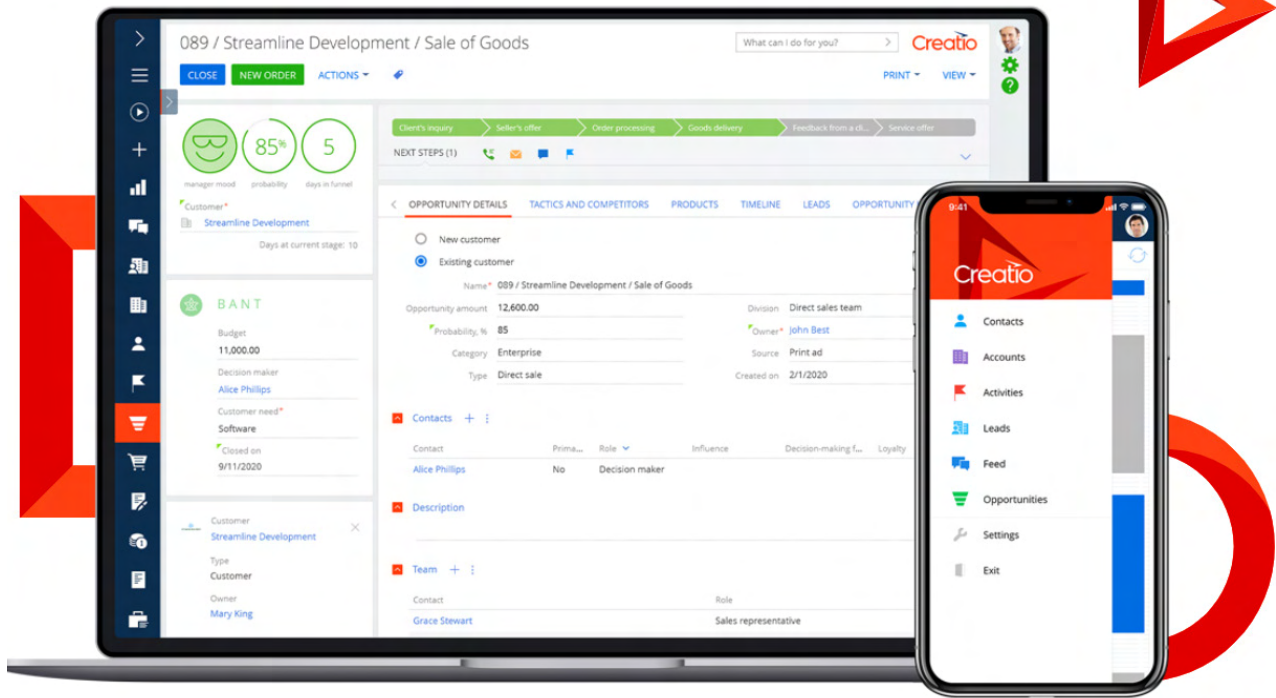
“Thanks to its flexible platform, Creatio has provided us the ability to adapt processes as business needs develop.”



Creatio

03

EFFECTIVE DISTRIBUTION MANAGEMENT



Creatio



04

EFFICIENT PRODUCT MANAGEMENT

Manufacturers and distributors need to be able to pivot quickly, especially nowadays. They also need to be able to produce high-quality products consistently and effectively. Substandard or defective products can tarnish your brand reputation and result in unsatisfied customers. CRM tools can help analyze data from multiple sources and identify process errors in real-time.

Additionally, deploying manufacturing in the distribution or manufacturing sector can give you detailed insight into inventory, order processing times, costs, omnichannel operations, and warehouse locations. These analytics allow you to better manage production schedules and get products to your customers quicker.

Flexible CRM platforms like Creatio also allow you to build QA work flows as well as store product specs, sales collateral, pricing info by vendor and easily create and manage discounts and multiple-price levels per SKU. With flexible dashboards and real-time reporting, you can also gain insight into top performing items, waste and pinpoint items of focus. This allows for more reliable production planning and grants visibility into forecasting and demand planning that can sometimes be lacking in many CRM solutions.

CREATIO FEATURE BENEFITS

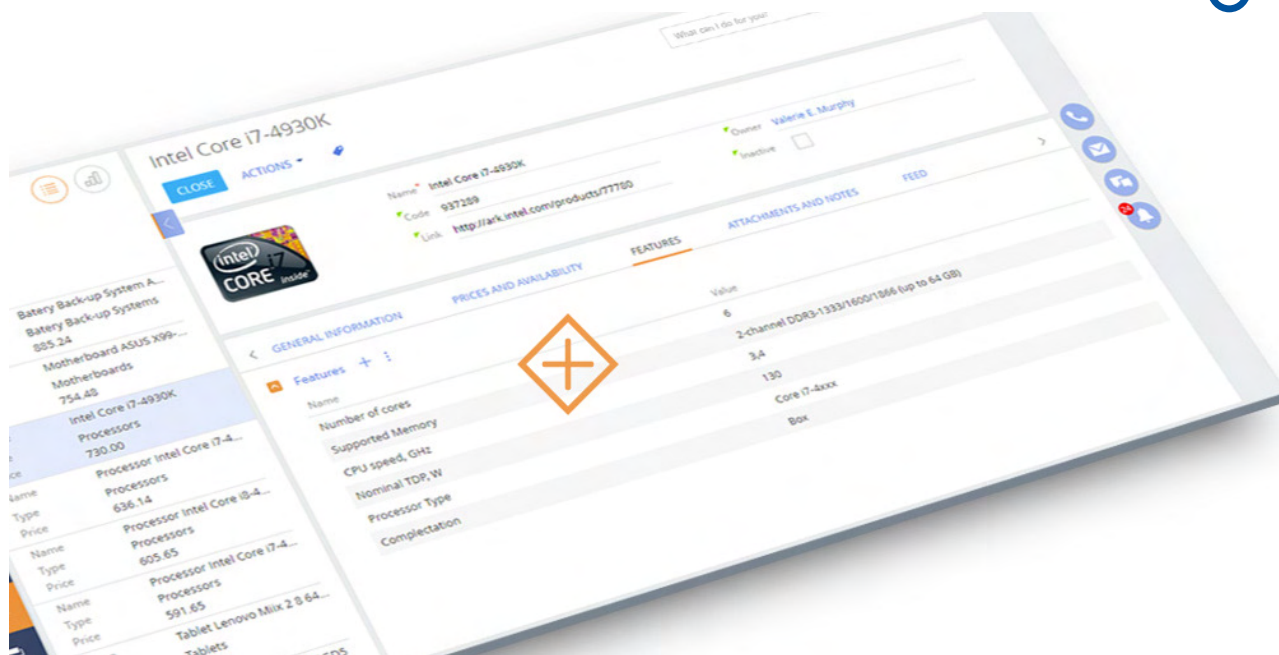
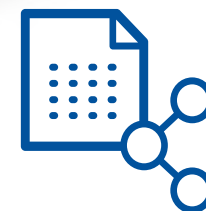
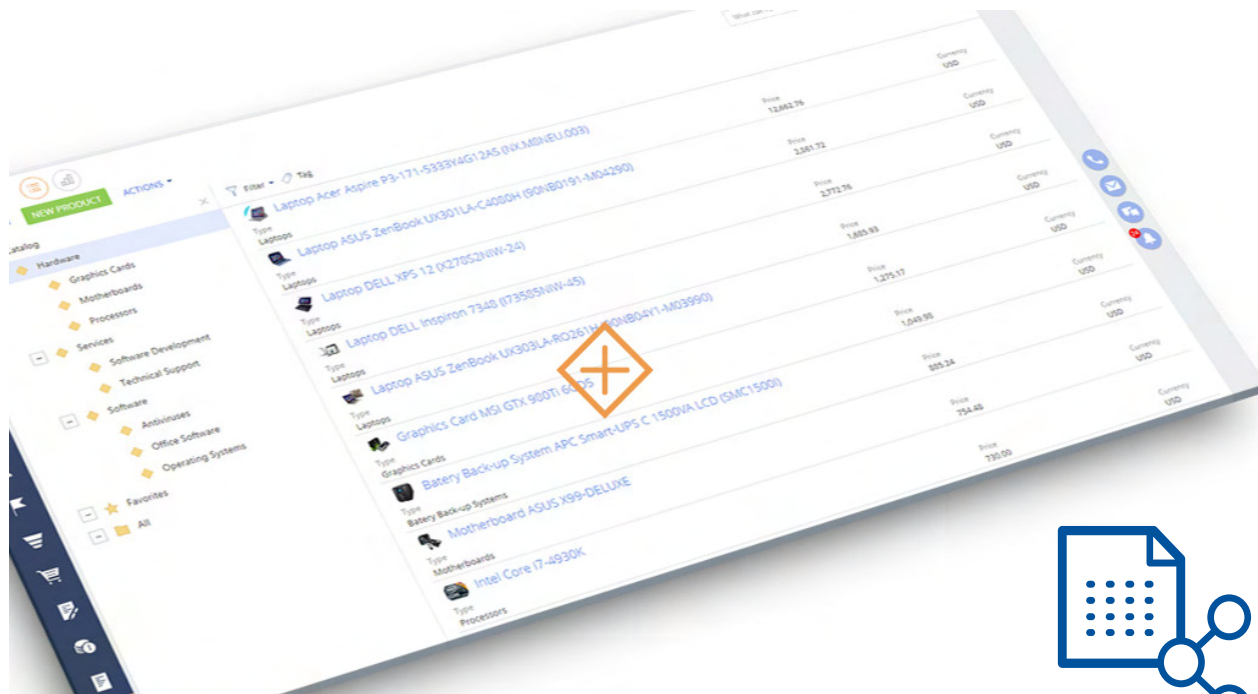
- Product catalogs with attributes
- Pricing and discount management
- Production reporting and analysis
- Product and order bundles
- Stock availability
- Warehouse lookups
- Production scheduling
- Reporting and custom KPIs

“Projections have a trickle-down effect. By helping production planning, they also help budgeting. When you have a detailed production, plan laid out for the year, you can properly budget based on the corresponding production costs. And with a proper budget in hand, you can better plan for future hires, equipment upgrades and other line items.”

Creatio

04

EFFICIENT PRODUCT MANAGEMENT



Creatio



05

RELIABLE CLIENT SERVICE

It's no surprise that customer service is critical when it comes to client retention. This focus goes for B2B and B2C. It doesn't matter if you are selling a tangible good or a specific service, what matters is the customer service and the speed in which your team is able to mitigate challenges.

With a flexible platform like Creatio, you are able to build smart-workflows and custom/complex ITSM processes by automating change orders, incidents, and support. It even allows you to configure multiple service levels, create subscription support plans, escalation alerts and configure custom solutions without development.

By leveraging an intelligent full-cycle service management platform, you take your customer service to the next level keeping all aspects of support on one dashboard. You can enhance this experience with process-centric UX and UI tools that allow you to simplify case routing and speed up resolutions. CRM solutions like Creatio allow you to think differently about your customer journey and build a workflow that works for your team. Whether you're in field service, online retail, professional services, wholesale, or manufacturing; build a smarter service plan, and streamline your customer service with a holistic view of the entire customer lifecycle.

CREATIO FEATURE BENEFITS

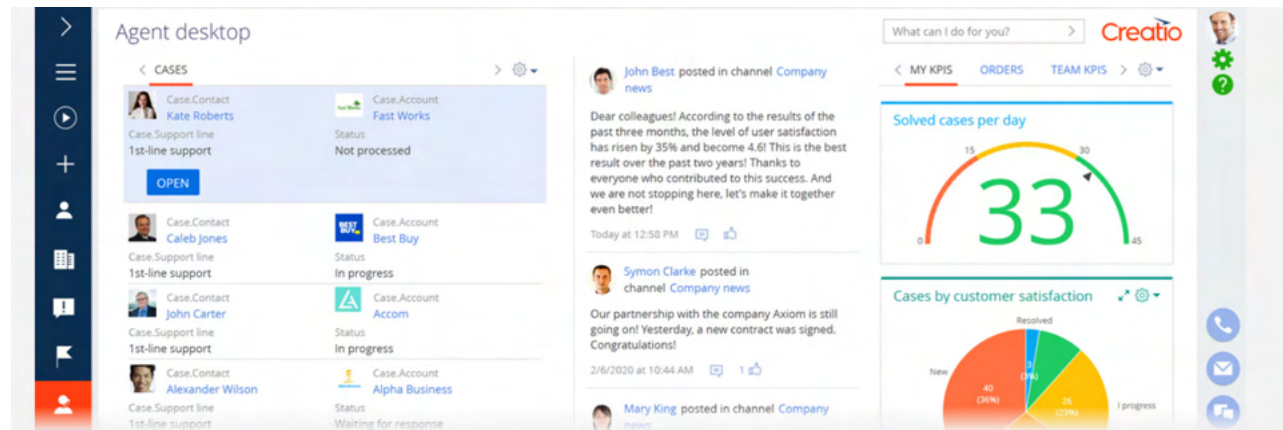
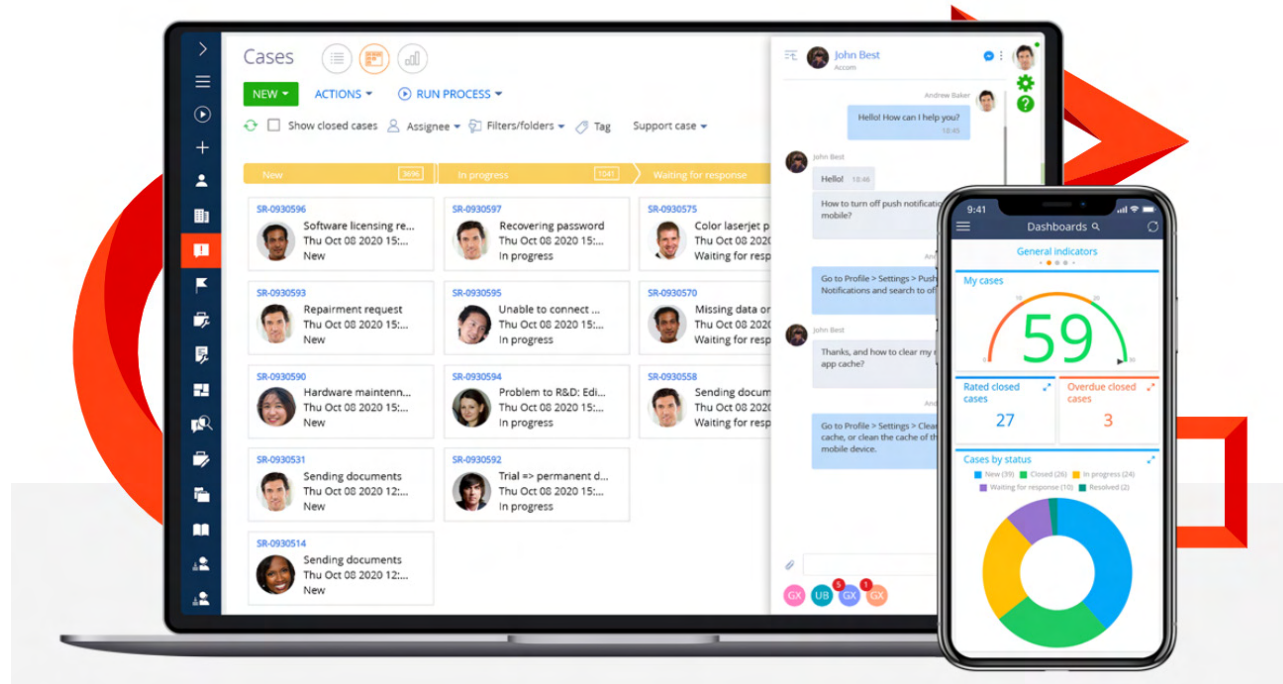
- Sales forecasting
- Real-time reporting and dashboards
- Close-ratio analysis
- Opportunity and pipeline probabilities
- Custom goals, KPIs, and alerts
- Easy-to-customize reports
- Demand planning

“Creatio helps us transform and grow rapidly, servicing our customers at jet speed!”

Creatio

05

RELIABLE SERVICE MANAGEMENT



Creatio



Creatio

Call today to explore your CRM software options with Blytheco.
Our team of experts is ready to help you start your **business transformation**.

949.583.9500

solutions@blytheco.com

www.blytheco.com

Laguna Hills, CA | Denver, CO | Minneapolis, MN