



Manage the Complete Customer Lifecycle

## NetSuite CRM



Today's successful companies adapt to their customer's needs. Where possible, they have replaced manual processes with automated ones to improve responsiveness. NetSuite Customer Relationship Management (CRM) delivers powerful capabilities all in a single cloud solution, including sales force automation, marketing automation, and customer service and support. NetSuite CRM also includes powerful sales performance management, order management, and partner management seamlessly integrated with NetSuite.

### Key Benefits

- Streamline lead-to-cash processes.
- Elevate productivity across the organization with a full view of your customers.
- Improve sales performance through forecasting, upsell, and commission management.
- Manage global sales, marketing, services, and partner organizations.
- Remotely access CRM data on your mobile device.

## **Sales Force Automation**

Equip sales with real-time access to prospect, customer, opportunity, and order records.

- Manage opportunities across status, revenue, key contacts, notes, and related documents.
- Provide sales managers with a complete view of all leads and opportunities in the pipeline.
- Capture detailed records across all interactions and convert opportunities into quotes and sales orders.

## **Reporting and Analytics**

Real-time dashboards deliver customizable, role-based reports to sales, marketing, and service teams.

- Measure continuous sales performance with personalized key performance indicators.
- Access sales goals such as achieved versus quota, actual versus sales forecast, and sales pipeline by stage.
- Monitor customer service metrics on call resolution times, customer satisfaction, subscription renewals, call volumes, and case trends.
- Examine marketing benchmarks like lead-to-close metrics, number of website unique visitors, lead-generation trends, and customer acquisition costs.

## **Sales Forecasting and Quota Management**

Build reliability, predictability, and trust into the sales process.

- Allow users to categorize the transaction forecast type to appropriately identify opportunities, quotes, and estimates.
- Utilize probability-based forecasting with adjustable weighted measurement of pending opportunities, quotes, and orders.
- Analyze actual sales and recurring revenue projections in forecasts and variances.

## **Upsell, Quote, and Order Management**

Easily convert quotes into approved sales orders and automatically process with back-end financials.

- Provide recommendations based on intelligent upsell management and buying patterns.
- Improve quote and order accuracy by including automated tax and shipping-rate calculations, pricing, and discounting rules.
- Accelerate order management with online approval and automated workflows.

## **Customer Service and Support**

Provide the customer service center with a full customer view.

- Automate case management processes for assignment and escalation.
- Track support cases according to product, issue, case type, partner, or customer.
- Enable online self-service with case submissions, status tracking, and communications.

## **Marketing Automation**

Automate multi-channel marketing campaigns to align with sales efforts.

- Enable rapid response to maximize the value of opportunities.
- Automate lead capture from websites, search engines, direct mail, and events.
- Build and send promotional or automated email marketing campaigns.
- Support upsell marketing based on historical purchasing patterns.

## Partner Relationship Management

Fully control every element of the partnering process.

- Manage leads, joint marketing, sales pipeline, orders, and commissions.
- Enable partners to register, manage, and track their leads.
- Provide full visibility into your partners' sales forecasts.

## Mobile

Access real-time business information on mobile devices.

- View, enter, and update key customer and sales data.
- Submit time sheets and expenses with easy snap and attach receipts.
- Manage everyday activities, tasks, and calls from your smartphone.

The screenshot displays the Oracle NetSuite Customer Dashboard for 'Botique 2021'. The interface includes a navigation bar with various menu items like 'Activities', 'Payments', 'Transactions', and 'Reports'. The main content area is divided into several sections:

- Customer (default):** A detailed view of the customer 'Botique 2021 Auto', including contact information, address, and primary subsidiary.
- Key Performance Indicators:** A table showing various metrics such as Sales, Forecast, Total Pipeline, Balance, and Days Overdue, comparing current values to previous periods.
- Customer Dashboard Links:** A collection of links for 'Sales Reports', 'Financial Reports', and 'Activities'.
- Top 5 Items By Sales:** A section for viewing the top performing items, currently set to 'previous one year'.



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# Adaptability has never been more important

Scan Me



Choosing the right ERP solution is critical. But choosing the right implementation partner is what defines success. Wenable brings together deep domain expertise, a customer-first mindset, and a relentless focus on outcomes to help businesses unlock the full potential of NetSuite.

Need an ERP implementation partner? Please reach out to us at [erp@wenable.com](mailto:erp@wenable.com)

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