:: Privately Owned, 10+ Years of Service
:: Consistent annual growth
:: Stable financial structure
:: Strong record of successful implementations
:: Rapid expansion to new segments in 2016

D3S
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Inception CRM

Product Overview

16.02.2017 | D3S a.s.

Global Service Capability

(A) Prague | (B) Warsaw | (C) Bucharest | (D) Istanbul | (E) Mumbai | (F) Dubai | (G) Jakarta

Successful Projects In More Than Three Dozen Countries

Most of our software projects reflect a broad set of functional requirements. In each case, global/corporate and country-specific requirements are met with **a flexible and adaptable** approach and implemented in an **efficient and cost-effective** manner in keeping with local budgets and expectations.

- Albania
- Austria
- Belgium
- Bosnia
- Bulgaria
- Czech Rep.
- Cyprus
- Denmark
- Finland
- Hungary
- Iceland
- Iran
- Iraq

- Italy
- Jordan
- Kosovo
- Lebanon
- Luxembourg
- Macedonia
- Morocco
- Netherlands
- Palestine
- Poland
- Romania
- Serbia
- Slovakia

- Slovenia
- Spain
- Sudan
- Sweden
- Switzerland
- Syria
- Tunisia
- Turkey
- Ukraine
- United Kingdom
- USA

Successful Projects In More Than Three Dozen Countries

Our clients have included some of the world's largest and most prestigious companies, representing a diverse a range of industries, from pharmaceuticals to telecommunications, manufacturing, online media and advertising.

Inception CRM

for iPads & Android Tablets

Inception CRM is a robust & user-friendly CRM app for sales teams that harnesses the power and flexibility of iPads, Android tablets, and Windows PCs to deliver superb performance on the go.

Our fully native CRM apps guide users through even the most complex workflows with ease and efficiency. With a few clicks, sales representatives can research customers, optimize plans, report activities, present media, create orders, manage promotional expenses, and track their most important KPIs.

1. HOME PAGE & QUICK NAVIGATION MENU
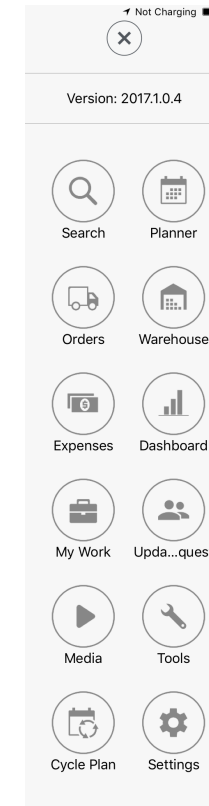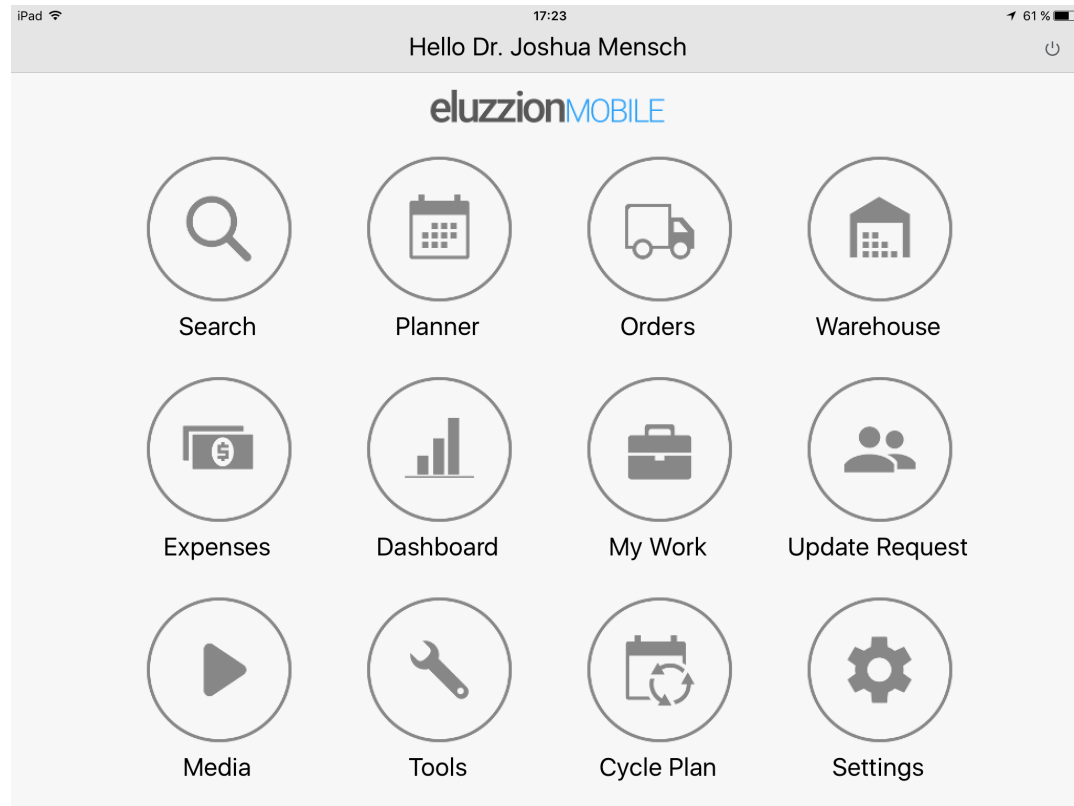
HOME PAGE provides immediate access to all modules, which can also be accessed via the sidebar menu from any module within the application.

2. HCP MANAGEMENT AND PROFILING – Search & Customer Cards (Search Module)
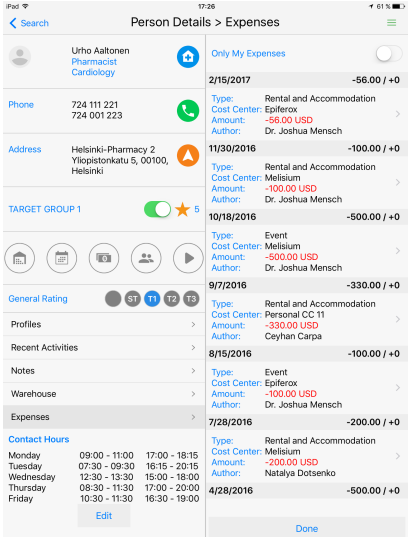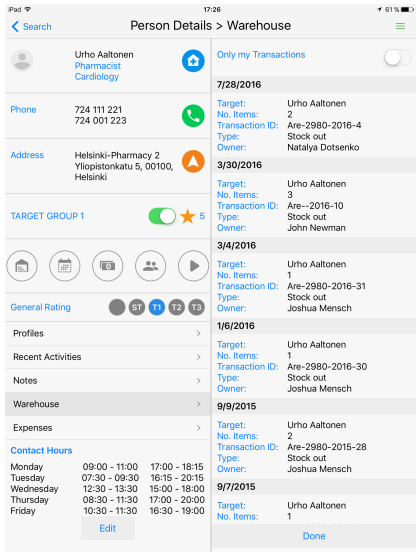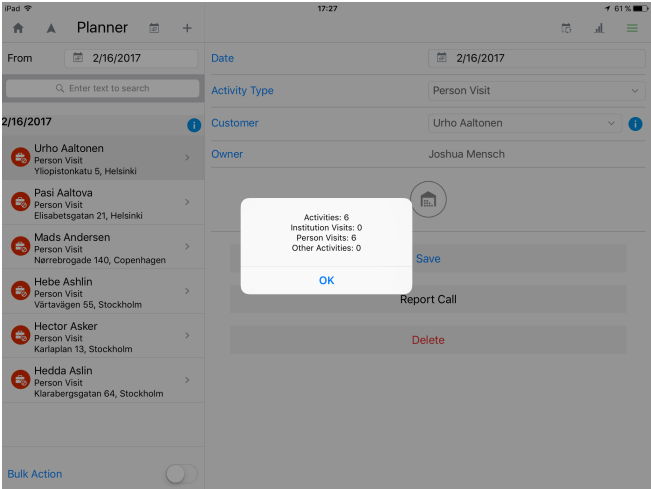
- Includes customer cards and rich features such as profiles, interaction histories, promo drops, orders, notes, and expenses

- Supports an unlimited number of profiles and multiple profile types (e.g. static vs. dynamic, editable vs. locked)

- Customer cards provide direct access to relevant modules such as Planner, Warehouse, Orders, Expenses, Media, and Updates

- The features of the Search List include bulk actions, free text search, and advanced search filters.
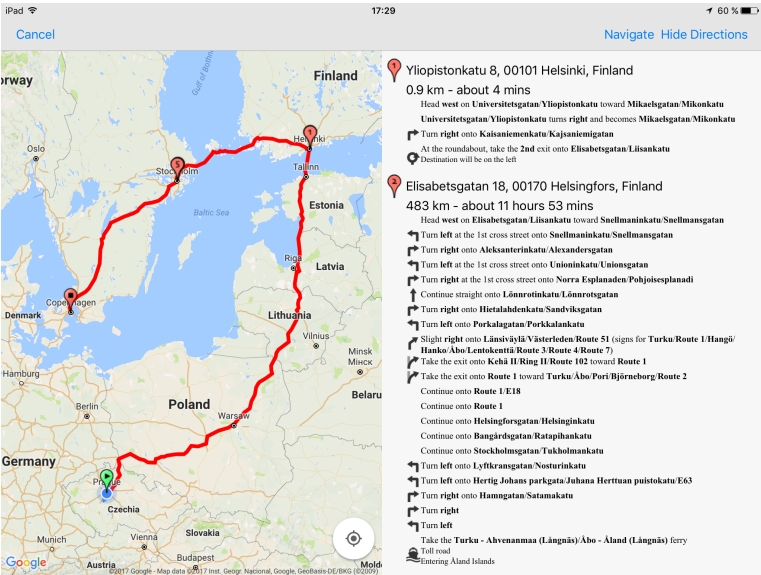
SEARCH allows reps to find client contacts quickly and review detailed info about customers, including profiles, interaction histories, financial investments, orders, and much more.

PLANNER allows reps to plan and report a virtually unlimited range of activities, each with its own workflows and reporting requirements, according to your company's demands.

3. ACTIVITIES AND NAVIGATION – Activity, Route, and Pre-Call Planning (Planner Module)

- Supports a virtually unlimited range of activity types each with their own unique workflows and reporting processes

- Includes a monthly calendar, daily activity list, cycle plan view, route maps, direct access to customer information (full customer card view), built-in analytics (activity overviews and statistics), all within a dynamic interface that adjusts according to selected conditions.

4. TARGET MANAGEMENT – Setting & Achieving FF Business Goals (Cycle Plan + Planner Modules)

- Allows FF users to plan period-specific campaigns with structured plans for sales and in-field marketing.
- Supports bulk planning of customer visits based on customer rating and frequency targets, as well as the rep's total call capacity within a defined period.
- Users can easily schedule visits in the Planner by dragging & dropping Cycle Plan customers onto the Calendar.
- Cycle Plan view in the Planner tracks goal fulfillment as the business cycle progresses

PLAN period-specific campaigns with structured plans for sales and in-field marketing.
Cycle Plan transforms target lists into firm commitments based on customer frequency goals.

- The Cycle Plan represents the plan of a specific Rep for his/her customer **Target Group** within a Cycle

- A Target Group is defined as a sub-set of customers in a Rep's database that (typically) represents the individuals with the **highest potential** for generating sales

- The size of the Target Group reflects the **call capacity** of a Rep within a given Cycle (nTG x Total Frequency = Call Capacity)

- A Cycle is a configurable **business period** – it can be a calendar month, business quarter, or other

- Changes made to a Cycle Plan for one period (e.g. C1), once approved, are automatically inherited by the Cycle Plan for all subsequent periods (e.g. C2, C3, etc.) until changed again

- Changes made to the Frequency and Tier of a specific customer, once approved, become permanent regardless of their disagreement with the official Tier-Frequency correlation

5. REPORTING – Sample & Promo Drop Reporting (Warehouse Module)

- An easy, intuitive tool for Reps to record all samples, gifts, and promo goods given to customers

- Allows limits to be set on goods that can be distributed to customers in compliance with regulatory rules and company policies

- Keeps records on the location of all distributed goods as well as their costs for promo spend tracking and P&L analysis

STOCK management for ensuring compliant distribution and use of samples and promotional goods, as well as keeping track of your promotional spend.

5. <u>REPORTING</u> – Expense Reporting (Expenses Module)

- An easy, intuitive tool for Reps to record cash advances and field expenses, from travel costs to business lunches

- Allows reps to report expenses by cost center and type, with no limits to the number of expense types supported

- Supports state management for multi-level approvals, which can be defined by cost center and expense type

EXPENSES are easily recorded and sent to accounting for real-time monitoring of field sales costs, supporting balanced, effective field sales budgets and timely reimbursements to reps.

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5. REPORTING – Call Reporting (Planner Module)

- Highly flexible approach allows for easy creation of multiple call report questionnaires that can be published simultaneously

- Supporting multiple question types, call reports can function as guided questionnaires, quickly satisfying complex reporting goals

- The system can automatically offer the most appropriate questionnaire according to customer status or relationship progress

- Questionnaires can capture data used across the system, such as profiles, which are automatically recorded based on answers
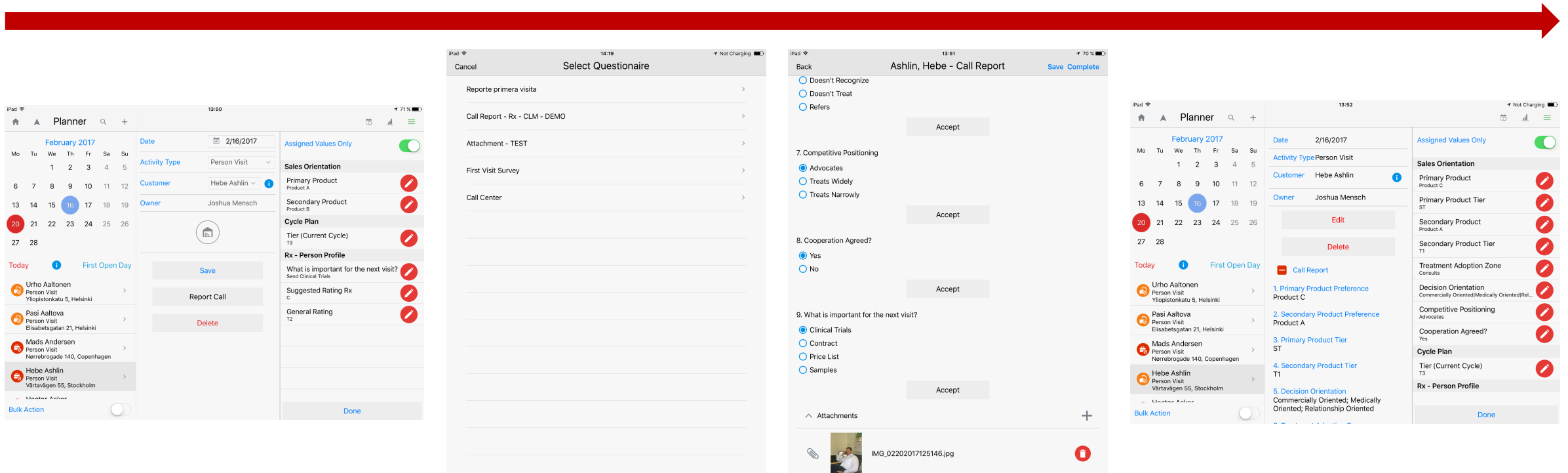
PROFILES are automatically captured and recorded during call reporting and stored in the Profiles section of the customer's card. **PHOTOS** can also be captured as evidence of visits.

6. MY WORK – (Tasks Module)
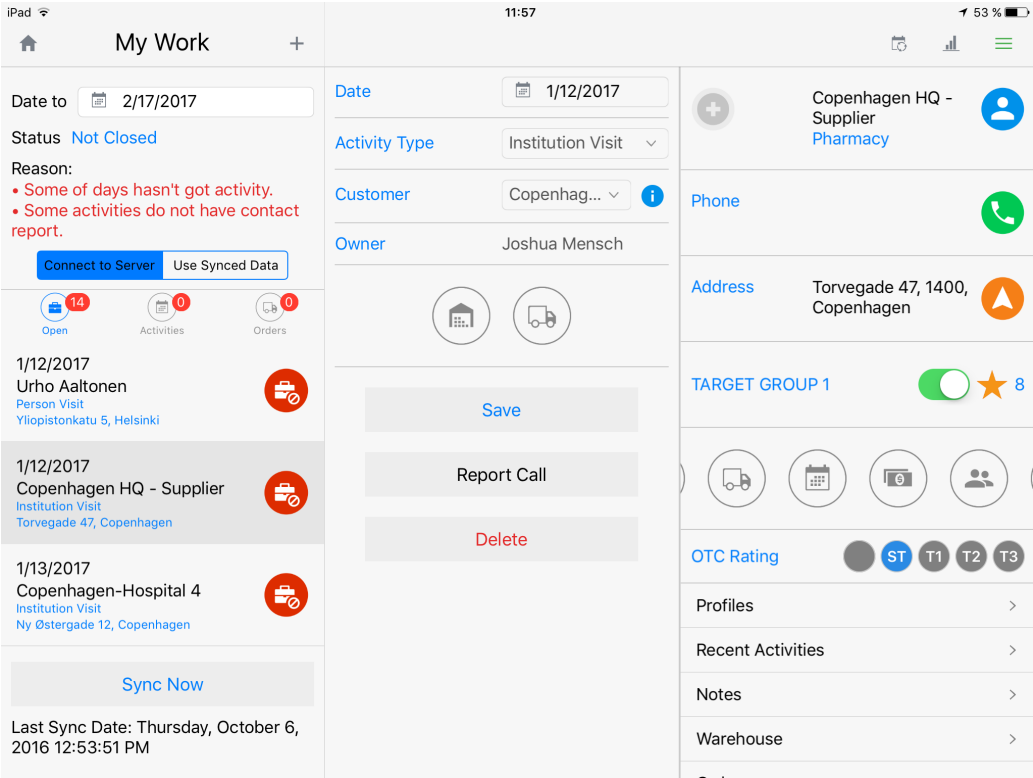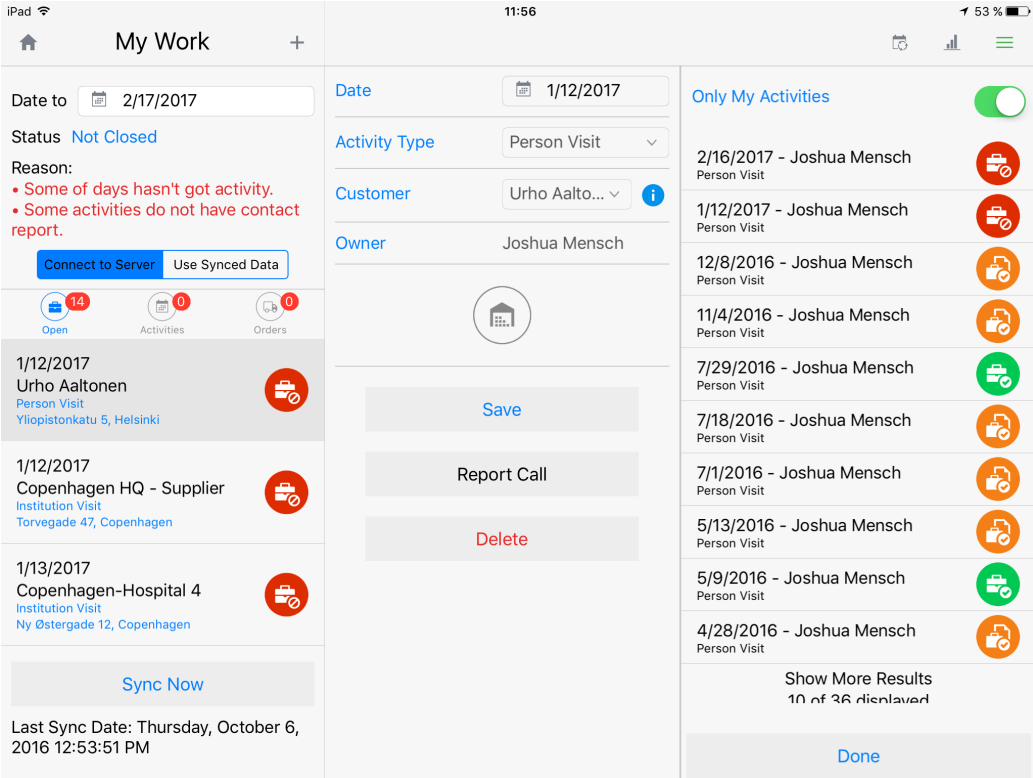
MY WORK puts all unfinished and pending tasks in one place, giving users the ability to quickly catch up on responsibilities – even when the device is offline – and complete their objectives for the day.

7. ORDER TAKING – Pharmacy Orders Made Easy (Orders Module)

- Template based, supporting a wide range of commercial conditions

- Allows reps to process multiple order types and apply variable discounts according to a wide range of balanced criteria

- Tracks the status of each order

- Supports multiple workflow scenarios (e.g. users can request orders directly from wholesalers and distributors, distribution managers in their own companies, or drop ordered goods directly) including different means of communicating order requests (email, XML, etc.)

- Supports the use of NIF codes and other identifying data

- Orders can be exported to ERP and other back office systems (e.g. SAP, JDE, etc.) for internal processing and records compliance

7. <u>ORDER TAKING</u> – Pharmacy Orders Made Easy (Orders Module)

ORDER pharmacy stock right at the point of sale, applying the commercial conditions you need to close the deal – from discounts and rebates to free pieces – in a secure, compliant manner.

8. ANALYTICS – In-App Dashboards & Analytics + Online Dashboards and Reports

- The CRM apps themselves built-in dashboard module, activity analytics in other modules like search, customer cards and planner.

- Fully leverages the features of MS Reporting Services 2016 for both dashboards and paginated web and export reports

- It emphasizes bespoke approach in addition to standard out-of-the-box reports and KPI's
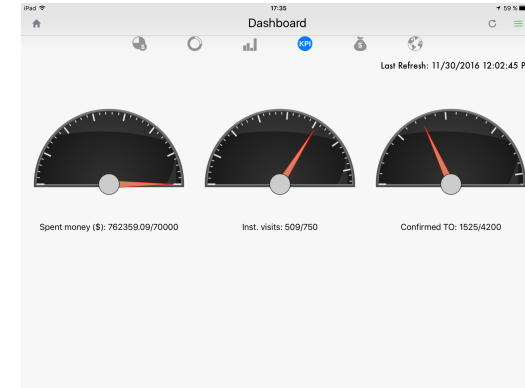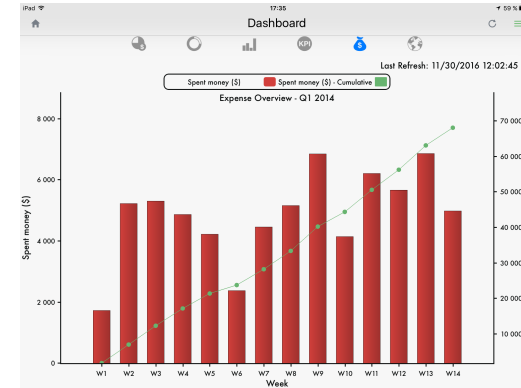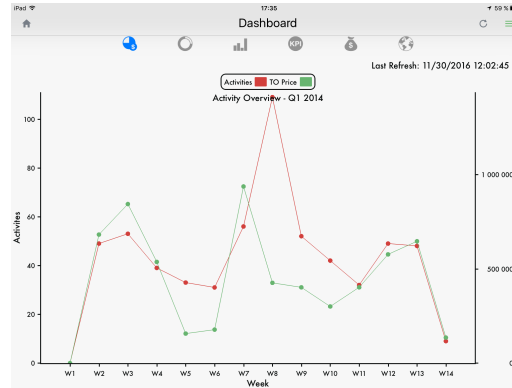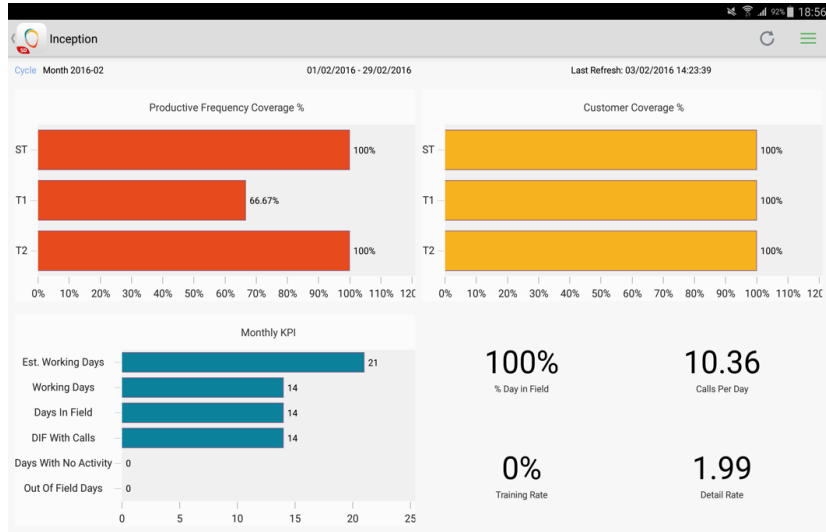
TRACK key performance indicators & results with interactive dashboards that can correlate data from multiple sources.
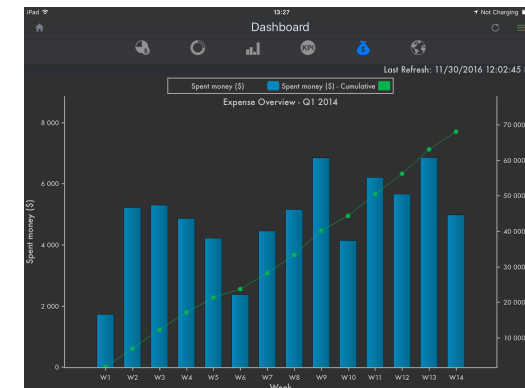
In-App Dashboards Examples
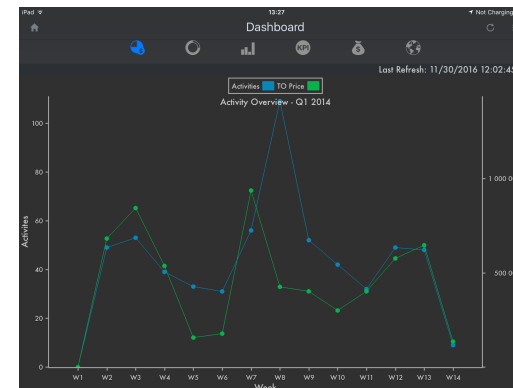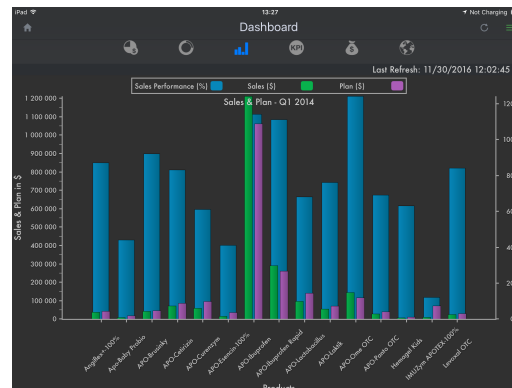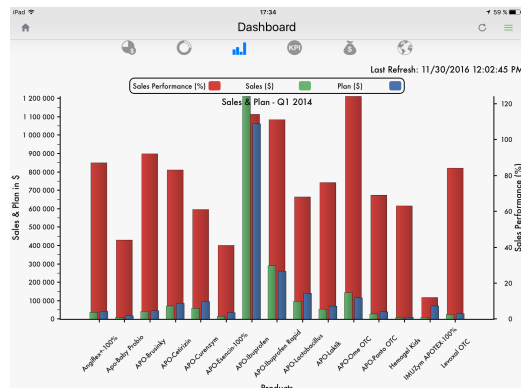
8. ANALYTICS – In-App Dashboards & Analytics + Online Dashboards and Reports

Business Intelligence Online is Inception CRM's comprehensive *Business Intelligence Suite* that include both classic dashboards and richly detailed tabular reports that support an extensive set of parameters drawn from multiple data sets and intuitive drilldown capabilities for insights based on deep data analysis.
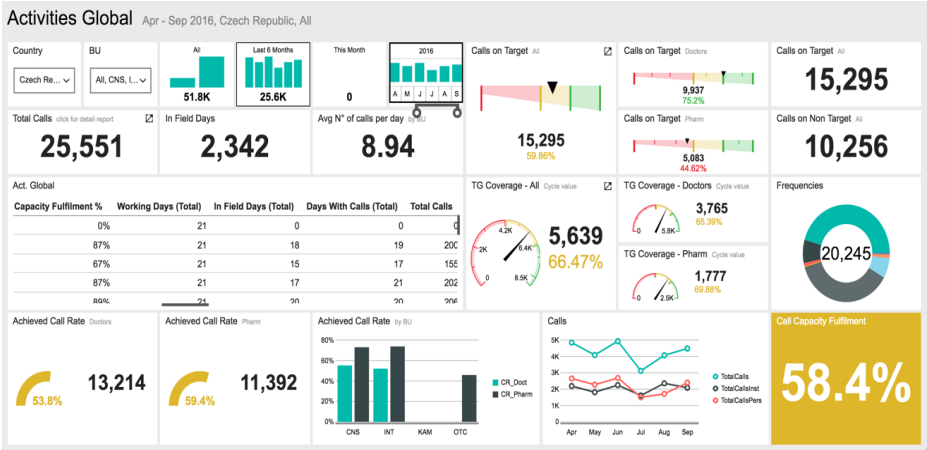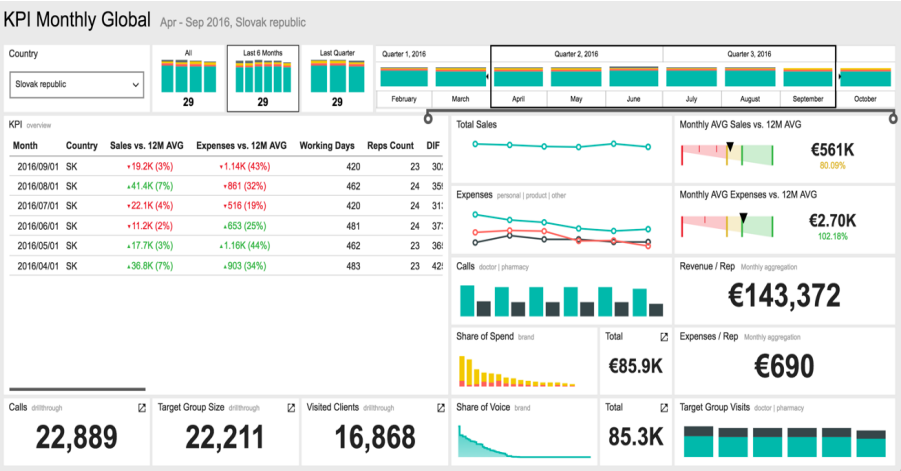
Leveraging the power and graphic capabilities of Microsoft's latest analytics suite (MS Reporting Services 2016), *BI Online* is a modern, continuously updated portal that incorporates **KPIs**, **Mobile Reports**, **Paginated Reports**, **Excel** and **Power BI Desktop** files into a single Business Intelligence platform.
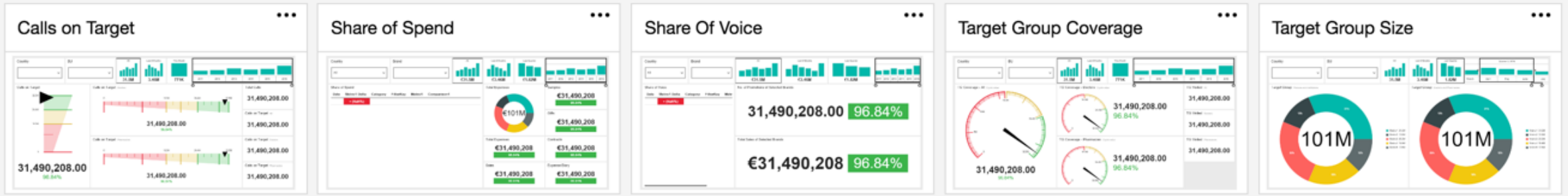
9. DATABASE MANAGEMENT – Updating Customer Information (Update Request Module)
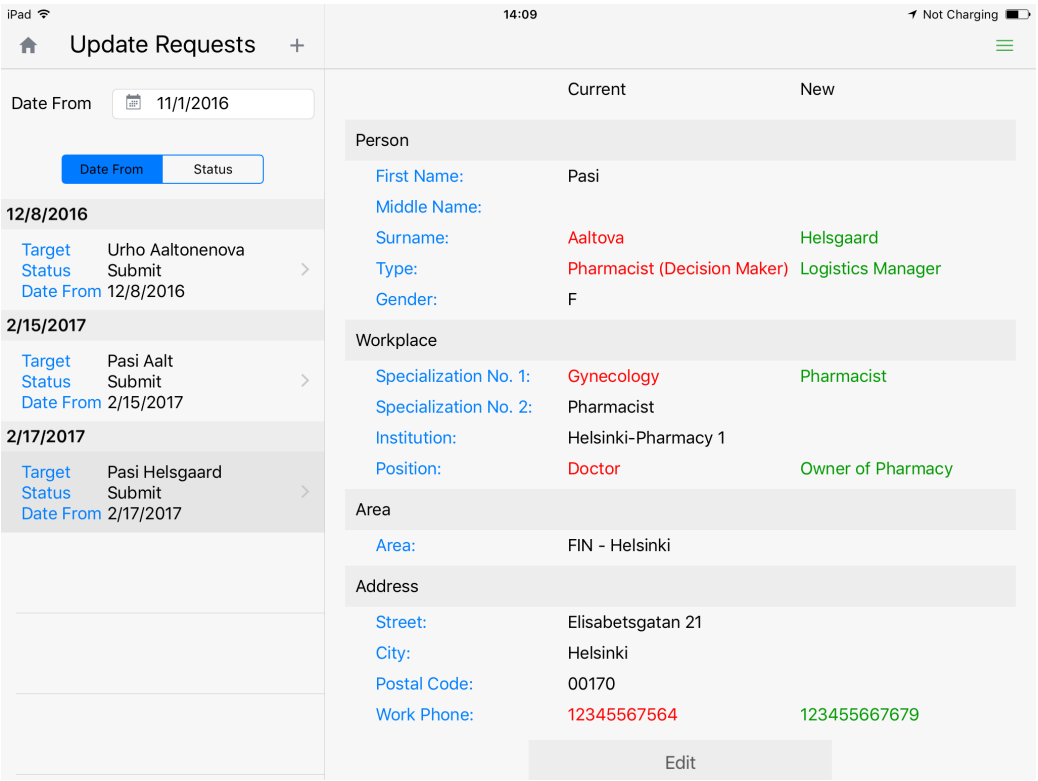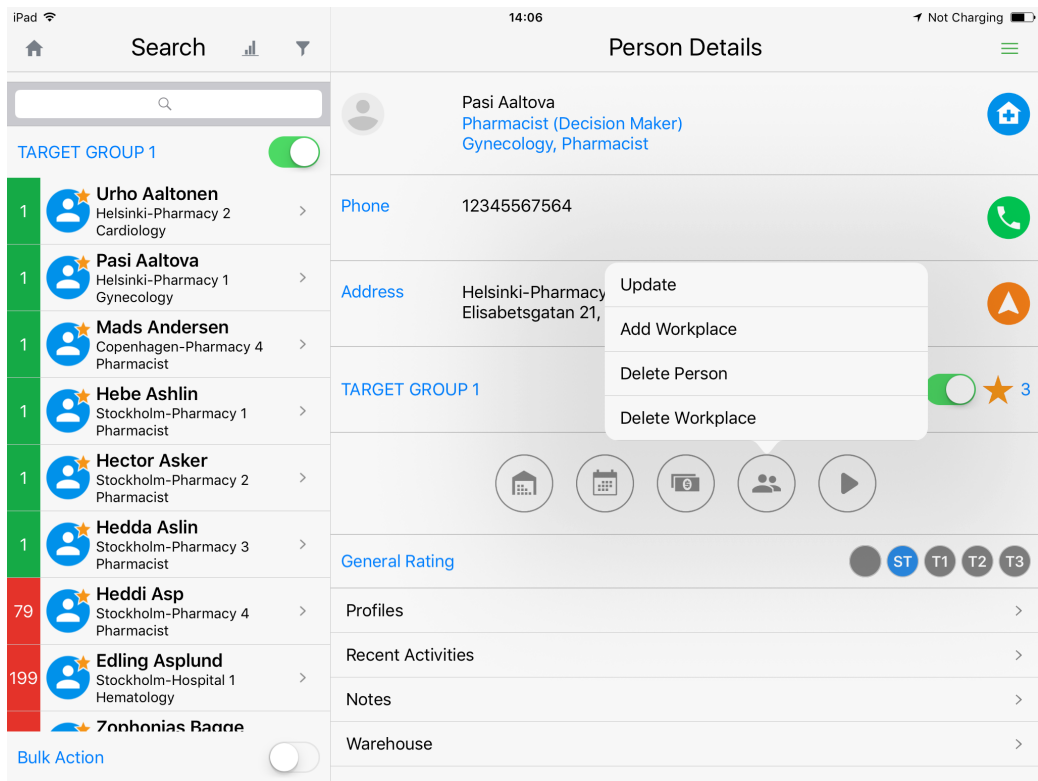
UPDATE REQUESTS maintain the validity of customer information. Users can update customer data on the fly, with changes processed immediately or after validation, according to company policy.

10. **CONTENT MANAGEMENT – Closed Loop Marketing (Media Module)**

11. Reps can access only the *latest approved content*, including PDFs, MS Office Files, Videos, and HTML5 presentations.

12. A smart publishing engine allows HO to decide who can receive can use specific content, and in what context.

13. When used to streamline workflows and reporting, CLM presentations can be used to complete call reports, record sample/promo drops, and create orders.

14. BI Analytics integration supports robust data capture for management dashboards and drilldown reports.
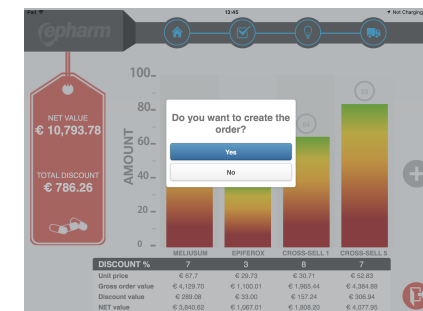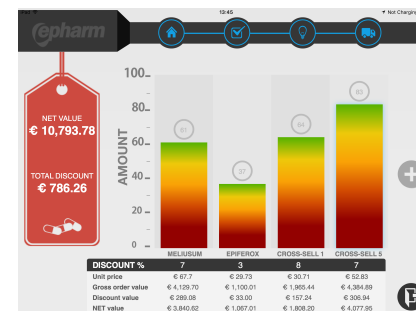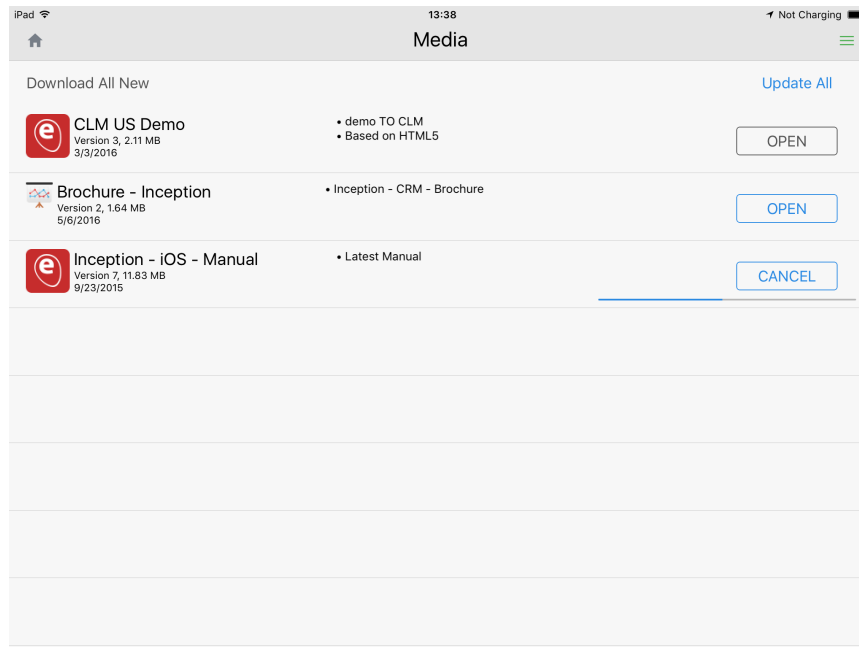
MEDIA is a built-in "app store" and publishing engine that supports a wide range of multimedia content, from approved docs and training materials to promo videos and interactive HTML5 CLM presentations.

SETTINGS allow reps to personalize their app experience, from theme selection and name appearance to active target group selection, while **TOOLS** supports bulk operations such as target group cloning and group profile changes.

12. KNOWLEDGE & TRAINING MANAGMENT: eLearning (online app integrated with CRM core)

ELEARNING is an online training tool and Learning Management System (LMS) designed for advancing the professional growth of system users through guided self-study and flexible testing schedules, with comprehensive reporting for evaluation of progress and results.
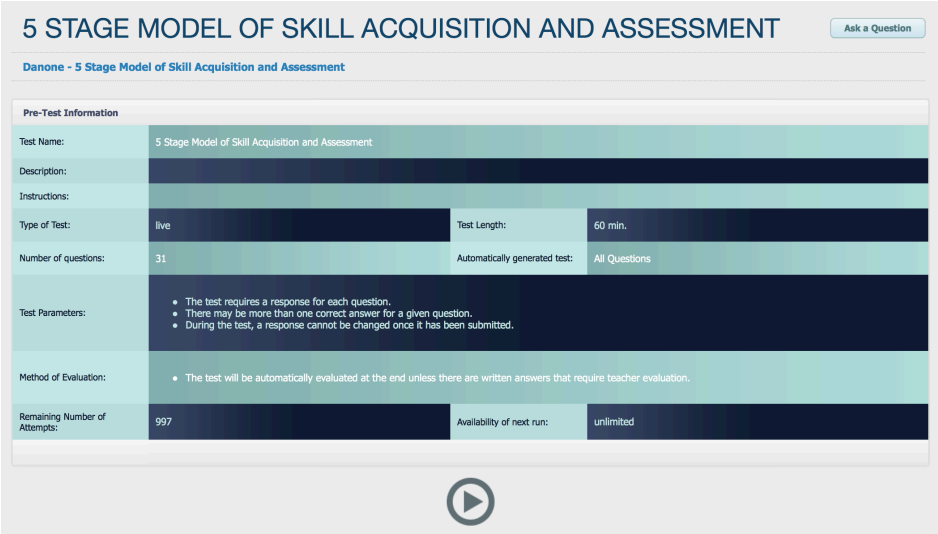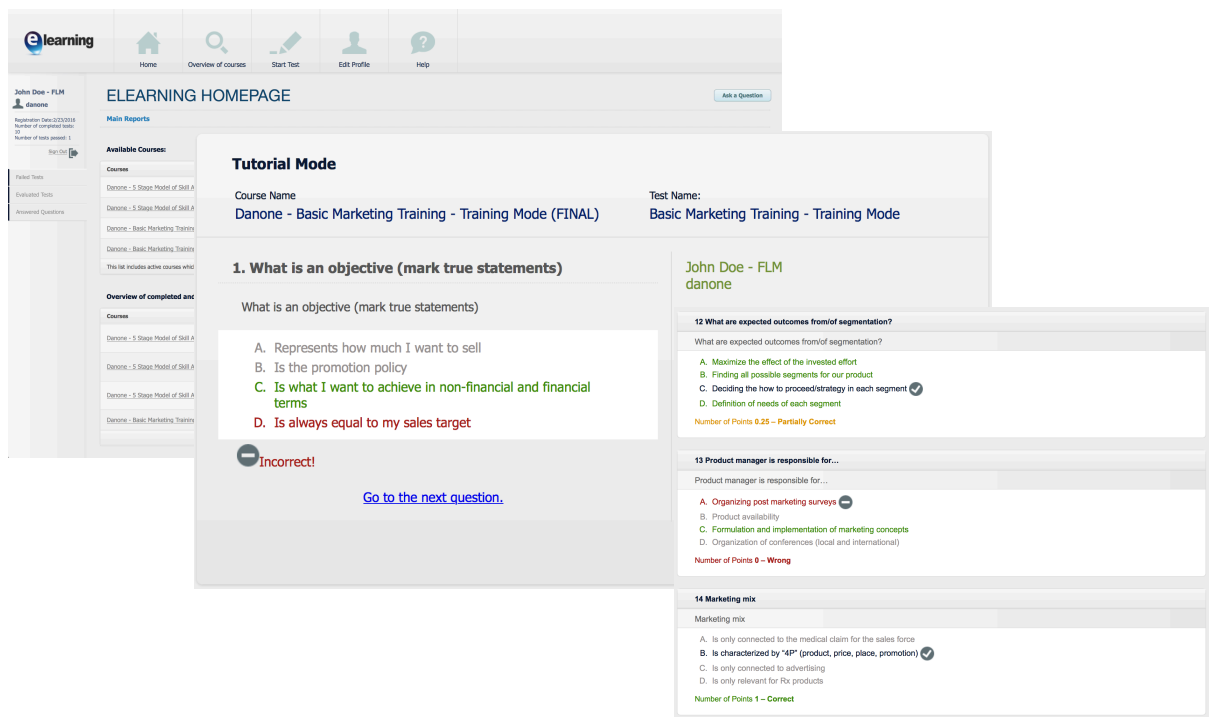
ELEARNING makes training & educational activities simple, fast, and flexible. Training managers can easily create courses that include both training sessions and final exams – which the system can automatically evaluate for immediate feedback. Managers can also upload training materials relevant to each question on a practice test to help users study independently and make progress in their knowledge of each subject.

13. TENDER MANAGMENT: Tender Web (online app integrated with CRM core)

TENDER WEB is an online, role-based platform that allows tender teams collaborate on the preparation of tender bids and offers in real time. Supporting structured workflows and approval processes, account, supply chain, pricing and executive managers can quickly prepare successful bids and build knowledge for increased win rates as the system learns.
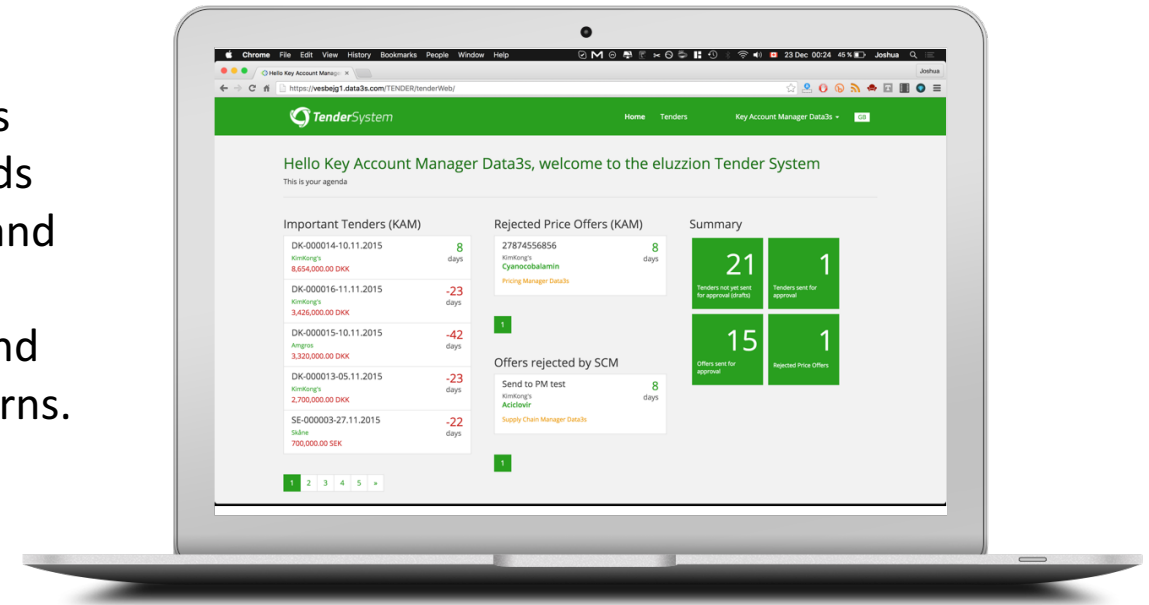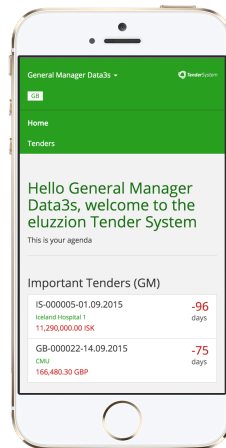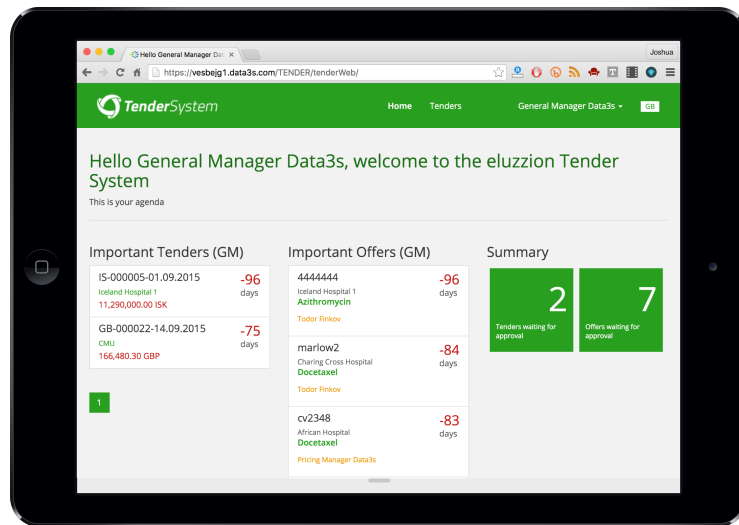
TENDER WEB is based on **real business intelligence** and **streamlines internal processes** so that competitive bids can be prepared and approved quickly from any device, and submitted early with the highest probability of success. When integrated with COGs data, the system is able to calculate the profitability of each offer before it is approved or submitted.