Customer Relationship Management Offering

Situation

Quick, focused sales and customer satisfaction are the two important key factors in success of an enterprise. CRM is a combination of policies, processes implemented by an organization to unify its customer interaction.

CRM systems facilitate the organizations to retain existing customers and reach out to new customers. There are various CRM solutions available, both open source and commercial. Customization of a particular solution and getting the best ROI from the same is critical to business.

Solution

Aftek understands the business challenges faced by organizations and has come up with various solutions to address the same. Aftek's solution encompasses these aspects and thus help save significant efforts and cost.

- Complete installation of CRM solutions
- Customization/Enhancements as required
  - Specific reports
  - Integration with other system
  - Integration with web site
  - Email alerts
  - SMS alerts
- IM BOT integration
- Mobile integration
- Microsoft Office integration (Outlook, Word, Excel)

A BOT, a Yahoo Messenger friend is developed. The user can interact with the CRM system by posting messages/commands to the BOT. The syntax of commands from the user are verified and relayed to the middleware. The response is processed and displayed as a message from the BOT.

Various mobile applications are developed working on J2ME enabled phones, Android phones and iPhone. The native features of each type of mobile phone are leveraged. The J2ME application works in two modes, namely in SMS (GSM), Connected (GPRS). This application works on majority of Java enabled phones, as it draws all the screens dynamically. The synchronization features helps the user synch all his/her contacts in mobile to CRM system and vice versa.

Features

- Get contact /active lead list
- Create contact or lead
- Search for a contact or lead
- Synchronization of contacts between mobile and CRM
- Get cases assigned to you and close them on completion
- Add note / task to a case
- Get appointments planned for today and tomorrow
- Schedule meeting / call

Architectural Diagram
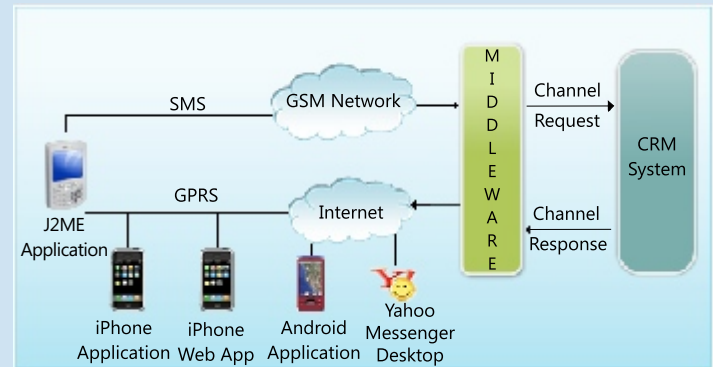
Technology

- Server
  - J2SE, J2EE (JSP/Servlets)
  - SOAP, Web Services
- Mobile
  - J2ME (MIDP/CLDC)
  - Objective C, XCODE, Interface Builder
  - ROR, iUI, WebKit
  - Android SDK

Benefits to the Client

- Ready to use CRM system
- Since majority of sales / support staff are moving the mobile application keeps them connected to the central CRM system
- The BOT allows for quick interchange of information between the user and CRM system, when using the web GUI may not be possible due to various reasons

Aftek's value-add

- Turn-key solution for CRM needs
- Mobile application and BOT application are totally customizable
- Mobile application works over GSM using SMS in addition to GPRS functionality

Challenges

- Creating a solution which should work for users who won't have GPRS facility - For this we had to create a separate module to interface SMS.
- Interoperability between various CRMs is handled using channels.

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Features at a glance:

	BOT	J2ME GPRS	J2ME SMS	Android GPRS	iPhone GPRS	Web App (iPhone) GPRS
Contacts / Leads						
Get contacts / leads	✓	✓	✓	✓	✓	✓
Save to vcard on mobile	–	✓	✓	✓	✓	–
Create contact / lead	✓	✓	✓	✓	✓	✓
Create from vcard on mobile	–	✓	✓	✓	✓	–
Search contact / lead	✓	✓	✓	✓	✓	✓
Directly call contact / lead	–	✓	✓	✓	NA	–
Directly send SMS to contact/lead	–	NA	NA	✓	NA	–
Appointments						
Get today's calls	✓	✓	✓	✓	✓	✓
Get tomorrow's calls	✓	✓	✓	✓	✓	✓
Get today's meetings	✓	✓	✓	✓	✓	✓
Get tomorrow's meetings	✓	✓	✓	✓	✓	✓
Add to phone todo/ calendar	–	NA	NA	NA	NA	–
Locate meeting location using maps	–	–	–	✓	NA	–
Cases						
Get cases	✓	✓	✓	NA	NA	NA
Get case details	✓	✓	✓	NA	NA	NA
Add note to case	✓	✓	✓	NA	NA	NA
Add task to case	✓	✓	✓	NA	NA	NA
Close case	✓	✓	✓	NA	NA	NA

NA : Currently not available

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