

Connecting your sales, marketing, customer service and support teams to data helps them add value to every customer relationship—and in turn, is critical to long-term success. That's why it's vital to give them the tools that put the "customer" back into customer relationship management (CRM).

With the Neocase Customer Relationship Management solution, you get a complete 360-degree customer view that enables your employees to work better, smarter, and with greater focus on the customer. Create a centralized repository of customer data that sits alongside Microsoft Office and Microsoft Office Outlook—the applications your employees use every day. The simple, intuitive role-based interface in Neocase CRM encourages wide end-user adoption and requires minimal training. Plus, permission-based dashboards allow users to fulfill customer requests efficiently and quickly.

By encapsulating all the functionality of Microsoft Dynamics 4.0™ Sales and Marketing with Neocase Customer Service, Neocase CRM enables employees to make sales decisions, market products, solve customer issues and cater to all aspects of the customer relationship experience.

### Neocase Customer Service adds significant value to Microsoft Dynamics CRM 4.0

- **Self Service Portal:** Give customers instant access to the knowledge base, enabling them to find answers prior to case creation.
- **Collaborative Case Management:** Create a collaborative case resolution process that allows for increased productivity inside and outside the organization.
- **Advanced Service Level Agreement and Contract Management:** Prioritize your service issues based on active support contracts and customer-specific context.
- **Searchable Knowledge Management Tool:** Organize, publish, and manage case knowledge with a structured, multi-media article database.
- **Customizable Partner Center:** Connect partners to the customer service and support process for better, faster case resolution.
- **Manager and Agent Dashboards:** View all case progression and performance in real-time.

### Neocase streamlines marketing campaigns with Microsoft Dynamics CRM 4.0

- **Direct e-mail:** Increase sales productivity by selecting customers based on common characteristics. Use standardized templates to send customized e-mails with special offers.
- **Marketing campaigns:** Plan your marketing strategy based on budgets and expenses, promotion codes, target products, and collateral.
- **List management:** Publish and manage lists for specific campaigns, or for future campaigns. Create lists using existing customer information, or by importing contact information from various sources into a single repository.
- **List segmentation:** Query lists to locate accounts that meet specific criteria.
- **Marketing templates:** Create a campaign and re-use it as a template for future campaigns.
- **Campaign execution:** Track campaign activities, import leads, convert leads to opportunities, view cost and performance data, and more.
- **Campaign tracking:** View campaign performance reports. Assess success based on opportunities, cost versus payoff, and other criteria. Analyze marketing results.



Business Intelligence with key reports

*“Using Neocase Technology, Toshiba TFIS is now able to offer a higher level of service that meets the expectations of customers and partners.”*

*- Luc Mandziara, Director DSC, Toshiba*

Neocase creates up-sell and cross-sell opportunities with Microsoft Dynamics CRM 4.0

- Opportunity management: Convert leads to opportunities, and track them throughout the sales cycle with customizable workflow rules.
- Sales management: Use customizable workflow rules and selling methodologies to track and close sales consistently and efficiently.
- Quotes: Create accurate quotes using a full-featured product catalog that supports complex pricing levels, units of measure, and discounts.
- Order management: Convert quotes to orders that can be modified and saved until ready to be billed as invoices.
- Sales force management: Measure sales performance and credit opportunities against a salesperson’s individual quota.
- Collateral: Create, manage, and distribute sales and marketing materials, including brochures, white papers, and competitor information.



The web-based dashboard showcases exactly what an agent needs to know to resolve customer cases in real-time

### About Neocase Software

Neocase Software is a leading provider of customer service solutions for shared service centers and customer support operations. Neocase empowers large global corporations to manage and optimize their shared service and support operations performance and processes through its uniquely adaptive and award-winning customer service technology platform. Neocase Software solutions include: Neocase HR for Human Capital Resource Management, Neocase CS for Customer Service, Neocase CRM for Customer Relationship Management, and Neocase FR for Financial Resolution. All solutions can be deployed on-premise or in a SaaS model. With more than 200 clients worldwide, representative customers include Air France, Renault-Nissan, L’Oreal, Brinks, CORPTAX, Callidus Software, and IDS. Neocase’s award-winning solutions bring efficiency and profitability to SSCs and customer service departments through web self-service, intelligent knowledge management, service level agreement (SLA) management, employee/partner case collaboration, executive dashboards, and automated workflows.