

By integrating CRM with mobiles,
we now can conduct effective sales activities

CEO Ms. Junko Anraku

Get the best timing through sales approaches based on customer information



Issues faced before implementation

Because the event industry has recently been reducing in size, AG Co. Ltd., needed to change their sales style from passive one, where they await orders from existing clients or ad agencies, to an aggressive one where they seek to develop new customers.

- **Lack of ability to develop new customers.**

Event sites such as exhibitions are places where one can find information on sales leads, but AG didn't have a good enough tool to efficiently obtain and organize information from these site.

Even though a person-in-charge is always present at the site, they still could not effectively use their time to develop new customers.

- **Missing the timing for sales approaches.**

For those undertaking sales at events, getting the right timing according to exhibition schedules is very important for securing leads. Because of other urgent jobs or not being able to make good use of available case information, AG staff missed a lot of opportunities to accept orders.

- **Lack of efficiency in site management.**

Persons-in-charge at events have to undertake sales activities and the management of human resources as well as the sites, all at the same time. They are therefore often away from the office. However, AG didn't have an environment to work efficiently outside.

How did SkyDesk solve your issues?

To solve these issues, AG Co. Ltd., uses SkyDesk CRM and SkyDesk Cards in the following ways:

1. Collecting information in one place

In SkyDesk Cards and CRM, we collect and manage information such as details in business cards from Leads found at exhibitions, content of the exhibitions and the utilization of human resources at such events.

2. Managing timings to approach

SkyDesk CRM gives a clearer picture of available Leads. By utilizing task functions, we can manage approach timings according to exhibition schedules.

3. Accessing SkyDesk from outside the office

Clients, Leads, schedules and information on Potentials are managed within the CRM. Now we can access SkyDesk from the event site or anywhere else outside the office via our mobile devices.

With task management, we no longer miss timings for sales approach.



Access the information on Leads in CRM via mobiles while away from the office.



CRM (Customer Relation Management)
Retrieve information on Leads using laptops/tablets



Cards (Business Card Management)
Capture business card information using smart phones.

SkyDesk



With CRM's task management, you can set a dead line to approach leads



What do you think are the results of implementing SkyDesk CRM?

After implementation of SkyDesk CRM

1. Fresh and accurate information captured by using SkyDesk at event sites.
2. No more missed sales opportunities.
3. Faster response to customers and more efficient field operations.

1. Fresh and accurate information captured by using SkyDesk at event sites.

For business cards we exchange with Leads or persons-in-charge from ad agencies and production companies at event sites, we are now able to import their data there and then. We can also input related information as notes, which we can later use efficiently during sales activities.

What's more, we can share business cards which used to be a private asset so that information on Leads now become a company asset.

By accessing CRM from mobiles, we can input and manage information such as exhibition contents, methods of demonstration and operational status of event staff at the site. In addition, we can now pursue follow-up sales activities based on more accurate information. We can also record information on narrators and other staff acquired at event sites on-the-spot, enabling us to secure quality human resources.

2. No more missing sales opportunities.

Sales at events is all about timing. Once an exhibition schedule is fixed, we can calculate the best timing for sales approach to Leads and set them in our CRM task management function – there are no longer any missed business opportunity.

3. Faster response to customers and more efficient field operations.

During busy periods, there are a big number of events so sales representatives are not able to return to the office regularly. However, they can now access information stored in our CRM via mobile devices. Therefore, we can utilize the system at the very site of events to, for example, urgently respond to other cases, or contact and provide information to our event staff.

AG Co. Ltd.,

■ AG Co. Ltd.,'s business

Event Human Resources Business, General Detachment, Outsourcing Business, Training Business, Creating Movie and Contents.

■ URL

<http://www.agcompany.com/index.htm>

What would you want to do next?

Staff, such as narrators and companions who are often engaged in events are not dedicated to one agency. They usually register with several companies, resulting in multiple agencies often trying to assign the same job to the same person.

Highly skilled persons are often engaged by clients and are considered assets in our business. That's why we need to ensure we connect with narrators and companions, but thus far we have no means to achieve that. For the next phase, we are therefore thinking of using the SkyDesk cloud service not only for managing Leads, Potentials and Tasks, but also for communicating with narrators and companions. We would love to utilize SkyDesk's various features more effectively by using them in combination with each other.

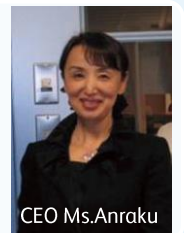
By registering narrators and companions on SkyDesk and sharing our Calendar with them, they would be able to decide which events they can or wish to join. We also get a clearer picture of each member's schedule so that we can arrange for staff to handle each event.

With the Activity and Chat functions, we can encourage more communication between companions and staff, making our office a more attractive place to work.

Thank you.

— Customer Voices —

We missed business opportunities as we didn't collect and manage information sufficiently. By integrating CRM with mobiles though, we can now conduct more pro-active sales activities.



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