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 your NetSuite ERP and ecommerce investments.

Key Benefits

- Streamline lead-to-cash processes.
- Elevate productivity across the organization with a 360-degree 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.

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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.
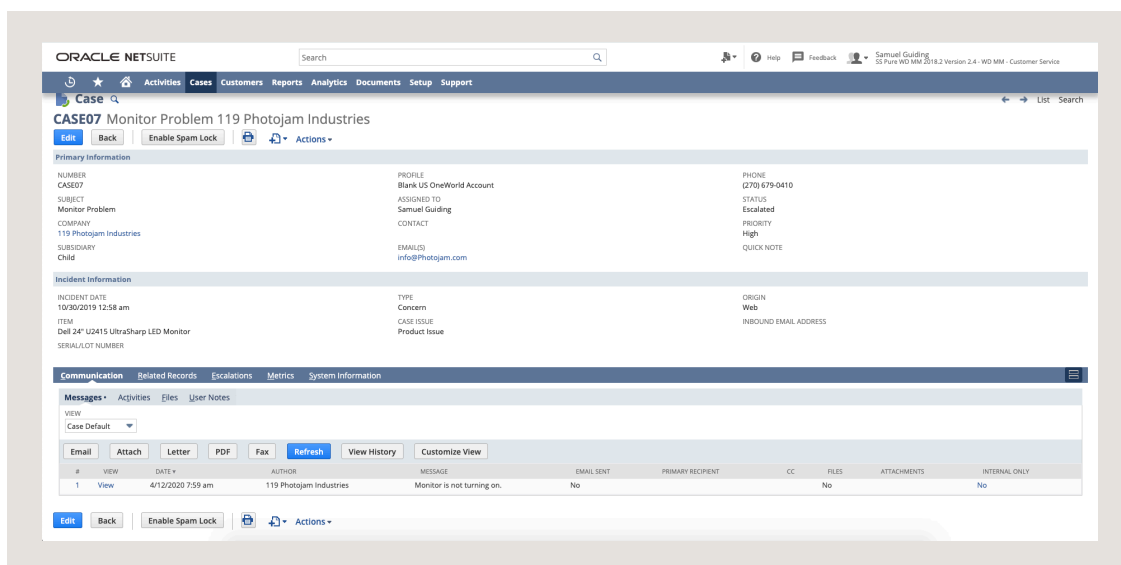
Customer Service and Support

Provide the customer service center with a 360-degree 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.

Ecommerce

Connect with NetSuite's ecommerce solution to create a single system of record for customer, activity and transaction data.

- Track every online interaction with prospects and customers.
- Improve sales effectiveness by providing greater visibility into products or services recently browsed.
- Enhance the customer experience by leveraging real-time data integrations between CRM and ecommerce.

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.

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‹ Customers   **Customer**

Airport Catering Services

☰   Edit

SUMMARY

Customer ID   **Airport Catering Services**
Status   **CUSTOMER-Closed Won**
Sales Rep   **Larry Nelson**
Web Address
Email   **jill.petersen@apclax.com**   ❯
Phone   **650-555-4144**
Address   **222 North Douglas Street Los Angeles CA 94114 United States**

CONTACTS (1)   ⊕   **View All**

Jack Gonzalez
650-555-1111   jack@email.com

ACTIVITIES (2)   ⊕   **View All**

Check in
Phone Call   3/26/2020

Follow up on quote
Phone Call   3/26/2020

MESSAGES (1)   ⊕   **View All**

Thank you for your Interest!
3/26/2020 9:41 am   Caitlin McGyver

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