

Sales and Marketing Automation





To service customers and develop new sales opportunities, supply chain representatives need immediate access to customer and product information. Reviewing past sales activity, product availability, pricing, and promotions are critical in matching customer requirements with your value proposition. As a sales representative, you need to build trust with your prospects and customers. Buyers need confidence that you understand their needs and have the resources to meet those needs. S2K Sales Force was built for supply chain representatives, and it combines powerful contact management capabilities with direct real-time access to S2K Enterprise ERP data. With this powerful sales tool, users can enter and track the status of quotes, orders, and returns, track the status of purchase orders and expected delivery dates, and review accounts receivable balances and payments. They can also access sales data that can provide insights into customer behavior and then leverage that data to react quickly to customer issues and opportunities. With S2K Sales Force, your sales team will be empowered to drive new business and make the most of every sales call.

Smart Center

S2K Smart Center is a unique custom home page where sales representatives can display tasks and events as well as key performance indicators (KPIs) related to their accounts. A daily task page keeps your sales team productive by reminding them of scheduled to-do's and calendar events to keep the sales process moving forward. Activity history displays a timeline of all interactions for every account, and Alerts display critical issues that require immediate attention. Powerful KPIs display real-time ERP data for open orders, quotes, receivables, sales, inventory, and much more. Sales managers can summarize this view for their entire sales team. Leveraging single sign-on from this one dynamic home page, sales representatives can access all the CRM applications, the full S2K Enterprise Suite, third-party browser-based solutions, and bookmark key external website, documents, reports, and dashboards.

The screenshot shows the S2K Smart Center dashboard for user John Doe. The interface includes a navigation sidebar on the left with links for Leads, Accounts, Contacts, Opportunities, Calendar, Quick Order, and Google. The main content area is divided into several sections: 'Open Activities' with a table of tasks, 'Alerts' with a list of notifications, and a 'Full Calendar' view for the week of October 1, 2018.

Action	Date	Time	Account Name	Contact Name	Phone	Reason
View	10/2/18	9:00	East Coast Distribution	Joe Sciescia	631-585-9500	Collection Call
View	10/2/18	9:00	Affordable Furniture	Jane Crowley	323-667-6660	Sales - Follow-up
View	10/2/18		Browstone Art Center	Brenda Wilson	917-618-6111	Hot Lead
View	2/14/18	9:00	Debra Edelstein	Debra Edelstein	631-724-9777	Collection Call
View	2/14/18	9:00	Betty Garret	Betty Garret	631-720-4343	Follow Up on Quote

Alerts

- 21/14/18: Customer Exceeded Credit Limit. Account: Debra Edelstein. Contact: Debra Edelstein. Phone: 631-724-9777.
- 10/2/18: Customer has not placed Order. Account: Affordable Furniture. Contact: Jane Crowley. Phone: 323-667-6660.
- 10/2/18: C/O Placed with High Total. Account: East Coast.

Full Calendar

Week of October 1, 2018

- 1 Monday, October 1, 2018
- 2 Tuesday, October 2, 2018
- 4 Thursday, October 4, 2018
- 5 Friday, October 5, 2018

Smart Center Activity

CRM

The Contact Management System tracks and records every stage in the sales process for each prospective client, from initial contact to final disposition. Users can review current leads, and convert leads to prospects, and prospects to customers. Sales representatives can manage contacts and track all interactions with existing accounts and opportunities. Users can log a call, create to-dos, schedule events, and add notes and attachments. Activities get posted to history so that users can easily review all of their interactions with an account.

The screenshot displays a CRM interface for 'Artisanworks'. The top navigation bar includes 'CRM - Leads', 'Welcome schu01 (schu01)', and 'Current Role: Sales and Marketing'. The main content area is divided into several sections:

- Account Info:** Account # 0000107, Status Active, Account Name Artisanworks, Date Opened 5/20/16, Phone 585-288-7000, Assigned 1 Frank Wilker, Assigned 2, Web Address, Dealer, Group Customer Referral, Referring Customer, Classification Hot Lead, Source 1 Customer Referral, Source 2 Referral, Tags, Currency Domestic.
- Opportunity Info:** Status Open, Opportunity Description, Projected Revenue, New Store Opening \$0.00.
- Alerts:** 2 Tuesday, October 2018. Alert: Customer Exceeded Credit Limit. Account: Artisanworks. Contact: Debra Edelstein. Phone: 631-724-9777.
- Contact Info:** Action, Contact Name, Account Name, Phone. View button. Contact: Emily Hilborn, Account: Artisanworks, Phone: 585-288-7900.
- Activity History:** Log a Call, Send an Email. Activity History list:
 - 10/2/18 1:55 AM Sales Follow Up: Spoke to Emily sent updated product brochure. Assigned to: Diamond Bonnie. Contact: Emily Hilborn. Account: Artisanworks.
 - 3/24/17 10:15 PM Lead Follow Up: Follow up with Emily again and see if she had time to review quote. Assigned to: Diamond Bonnie. Contact: Emily Hilborn. Account: Artisanworks.
 - 3/13/17 11:15 AM Lead Follow Up: Follow up with Emily on quote and pricing. Assigned to: Diamond Bonnie. Contact: Emily Hilborn. Account: Artisanworks.
 - 3/6/17 10:00 AM Lead Follow Up: Follow up with Emily to see if she want's pricing on anything. Assigned to: Diamond Bonnie. Contact: Emily Hilborn. Account: Artisanworks.
 - 3/3/17 9:00 AM Lead Follow Up: Call Emily - Out sick yesterday - see if she would like some pricing. Assigned to: Diamond Bonnie. Contact: Emily Hilborn. Account: Artisanworks.
 - 3/2/17 11:30 AM Lead Follow Up: Follow up with Emily on getting pricing. Assigned to: Diamond Bonnie. Contact: Emily Hilborn. Account: Artisanworks.
 - 2/27/17 9:30 PM Lead Follow Up: Call Emily to see if she had time to review the catalog and would possibly

CRM Activity



Immediate Access to Enterprise Information is the Key to Success

Customer

Providing excellent customer service is the key to retaining your most valuable customers. S2K Sales Force gives the sales team full access to customer information. Sales representatives can review a customer's accounts receivable, open invoices, and payment history. They can check the status of open orders, returns, and quotes. They can also use S2K's case management to track business issues to completion to ensure that your organization is providing the highest level of customer service.

360° Customer View

- Account Summary
- Accounts Receivable Aging
- Open Orders / Quotes
- Open Invoices / Credits
- Invoice / Payment History
- Sales Analysis


Product

Inventory information is vital for supply chain representatives. If you can quickly communicate accurate inventory information with your customers, they will have trust in your ability as a supplier, which in these times of high competition is a very valuable asset. S2K Sales Force allows your sales team to review full product information such as: specifications, images, and availability across all companies and locations. They will know what's in stock and what's out of stock, when shipments will arrive, and when production will be complete.

View All Items

Item Summary

Location:	ABC Stationery NY	Stocking:	EA/ 1.0	Length:	0.0
Item Number:	013-380-345	Selling:	EA/ 1.0	Width:	0.0
Description:	Premium Paper 8 x 11	Purchasing:	EA/ 1.0	Height:	0.0
	Classic White 500 Sheets	Other:	EA/ 1.0	Cube:	0.0
		Inner Pack:	0	Weight:	0.0
Division:	Office Supplies	Master Pack:	0		
Class:	Desktop Accessories	Type:	Purchased		



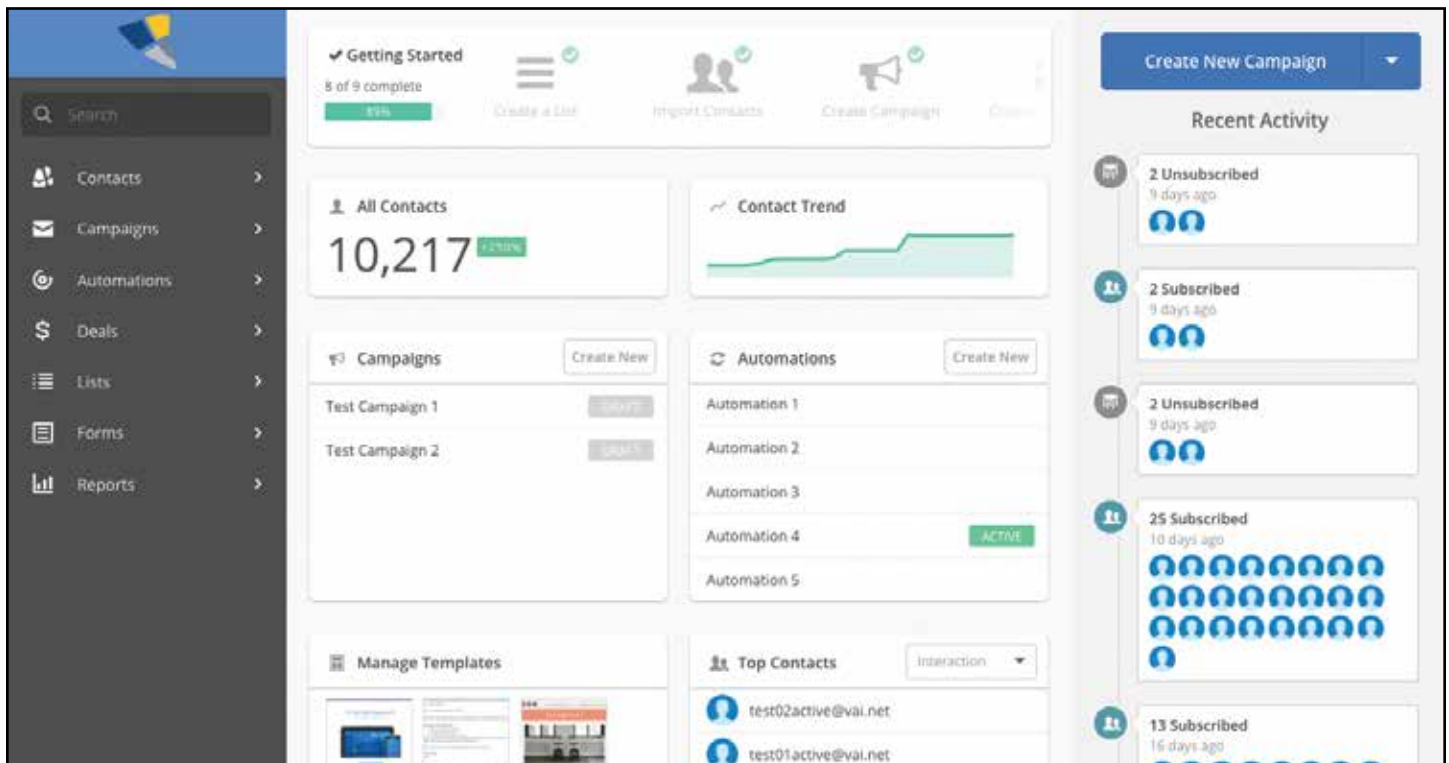
Stock Status

Loc Name	On Hand	Comm:	Avail	BKO	Open PO	Cargo	Future	Transfer	M.O	WIP
Company : 101										
20-ABC Stationery CA White	0	0	0	3	0	0	0	0	0	0
10-ABC Stationery NY	5	4	1	2	3	0	0	0	0	0
30-ABC Stationery Retail Inc.	2	2	0	0	0	0	0	0	0	0
Total	7	6	1	5	3	0	0	0	0	0

Item Inquiry



Growing the value of your customer relationships while also converting new prospects can be a tough challenge. Email Marketing is the art and science of using email to both nurture leads and engage existing customers. S2K Marketing Cloud is an Email Marketing tool oriented towards marketing automation. Based on the actions and behavior of your subscribers, you can add tags to their profile that will allow you to target specific contacts based on their buying behavior. With this powerful tool, marketers can segment their lists to drastically improve the effectiveness of their email campaigns. Designing beautiful email messages does not have to be tedious. With S2K Marketing Cloud, users can leverage hundreds of templates and add as much customization as needed to style and brand an email campaign for your business. Drag and drop images, content blocks, and social icons, then rearrange them as you need. Advanced users can upload their own code by using the HTML import tool. With a high return on investment, Email Marketing is one of the most effective tools to generate sales and increase brand awareness.



S2K Marketing Cloud

Marketing Analytics

With S2K Marketing Cloud, you get a complete analytical toolbox that helps you grade campaign performance. Stay up-to-date with accurate insights and statistics, and use this information to improve your overall engagement strategy. With this tool, you will be able to see how many recipients have opened your campaign, who they are, and which links have received the most clicks. You will see which email addresses have bounced, and why. Discover the exact geographical locations of recipients who open your campaigns, as well as the open dates and times. Optimize your campaigns with access to stats about which devices, operating systems, and web browsers your recipients are using to view your campaigns.

Marketing Automation

With S2K Marketing Cloud, sending out well-timed emails is not a monumental task, thanks to access to dynamic automation features. With powerful automation tools you can continue to engage your subscribers depending on how they have responded to your previous messages by sending a series of specific action-based emails. Whether you are thanking a customer for their business, informing them of a promotional offer, sending a birthday message, or reminding them about an important deadline—reach out to your subscribers at every opportunity for longer and more meaningful connections. Every interaction you have with them is a step towards a stronger relationship.

Interacting with your audience regularly can build trust and brand recognition. With automated workflows, you can give your subscribers the information they want during each stage of the sales funnel. You can create a workflow that will automatically separate and send emails to your subscribers based on their response to your previous campaigns, scores, shopping cart activity, web page visits, and much more. Using automation, marketers can save time by setting up the email platform to send messages when customers take specific actions.

With advanced marketing automation, you can nurture prospects and customers with highly personalized, useful content that helps convert prospects to customers and turn customers into delighted customers.

Reach Your Target Audience

STEP 1

Send a targeted email to announce a new product line and offer, with a link to the product page on your web site to a list of contacts that have purchased or expressed interest in a similar product line.

STEP 2

The system automatically sends a personal thank you note to all people who viewed the offer, and then sends additional information about the product.

STEP 3

A few days later, the system automatically sends a follow-up email to the list of people who viewed the offer but did not visit the product page, stating that the promotion is expiring soon.

STEP 4

When someone visits the new product page on your web site, your sales team gets a notification so they can follow up with them.



Sample
Automated
Email Workflow

A graphic showing several interlocking puzzle pieces. One piece is missing, creating a gap. The pieces are in shades of blue and white.

Ready to Align Marketing and Sales?

Lead Scoring

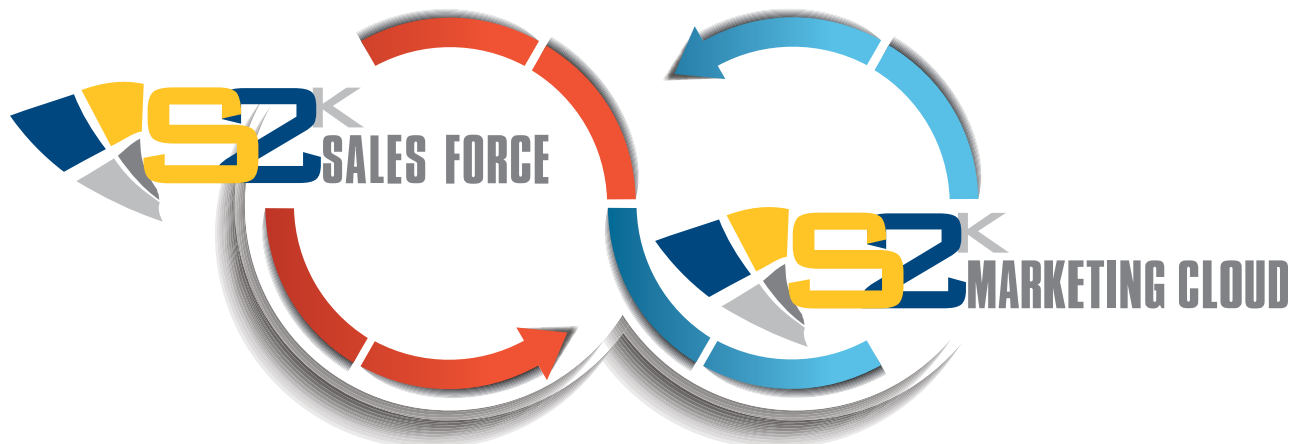
With S2K Marketing Cloud, you can improve your lead qualification processes with automated lead scoring based on account behavior. Use our flexible scoring system to assess your prospect's product fit and level of engagement as you follow up with them. Use scores to create segments, find marketing qualified leads, and tailor your follow-up. Add or subtract points when prospects click campaign links, visit specific URLs, perform custom events, subscribe or unsubscribe from lists, and more. When a lead surpasses a certain score, you can trigger a workflow to set off a series of actions including notifying the sales representative in S2K Sales Force.

With S2K Marketing Cloud, you can create a stellar experience for each contact at every stage of the customer lifecycle. This powerful tool helps your contacts quickly progress from interested leads to satisfied customers, and then ultimately, to outspoken advocates with personalized, intelligence-driven experiences.

CRM Integration

The contact database in S2K Marketing Cloud and S2K Sales Force CRM are always in sync, so marketing can pass leads to sales and sales can pass customer information to marketing, without any manual entry. Sales representatives get instant insight into the content a lead or customer has consumed, what links they have clicked on, and what web pages they have visited. You can automate lead scoring so that sales representatives are only notified when a lead becomes hot. Say goodbye to scattered solutions, and unite all of your teams around a single process that will ensure that you never miss a chance to follow-up on a potential opportunity. With S2K Marketing Cloud, you will eliminate wasted time and effort so you can easily increase traffic, convert more leads, win more customers, and turn them into promoters that grow your business.

Seamless Integrated Sales and Marketing





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