

Customer Relationship Management (CRM) Suite - JAMIS Prime ERP

What are the benefits of adopting JAMIS Prime's CRM solution?

- Increase customer insight, allowing your business development professionals to better understand your customers' needs*
- The government contract business development cycle can be long. Track the details within each of the stages and dates in the capture management process, from pre-solicitation, to requests for information, to RFP.*
- With an integrated CRM, you can produce more accurate forecasts that include high probability opportunities*
- Give everyone in the organization visibility into sales data such as competitor win rate, contract incumbent info, agency history, teaming relationships and more to help you focus in on the right opportunities*

Features of JAMIS Prime CRM Suite:

Opportunity Management

Opportunities provide a central place where team members can collaborate on business development tasks and activities. Customizable opportunity types and classifications will help keep you aware of the details in a simplified manner.

Outlook Integration

Gives users the ability to add emails as they come in to the appropriate account, support case or opportunity. This saves time and eliminates the extra step of keying in information into the CRM system.

Approvals and Workflow

Manage permissions and customize approvals to match your business development processes. You can also restrict rights to specific customer accounts to limit exposure of key activities.

Document Management & DocuSign Integration

Store documents, use version control capabilities, and link to SharePoint documents. Or take it to another level and use our new DocuSign integration and go completely paperless. This gives you the ability to store contract agreements, partner agreements, NDA's, and much more all in one place.

Dashboards, Pivot Tables, and Power BI Integration

Administrators can create announcements and default dashboards which can be customized by each business development team to match their individual needs. Dashboards and favorites link business development personnel to real-time information delivered in tabular or graphical form.

Account and Contact Management

Leads can be converted into business accounts, which are in turn linked to contacts, activities, tasks, opportunities, cases, and documents to provide a 360 degree view of the account. Your sales team will be instantly notified of any recorded activity which may impact their account.

Seamless Contract Lifecycle Planning

JAMIS Prime provides a single system for tracking customers through the cycles of unqualified leads, to prospecting, to closing, and finally to up-selling. This provides your teams with a complete history of communication and business history to eliminate confusion and improve conversion rates. And process automation will notify each department of their roles and responsibilities along the way.



JAMIS[®]
www.jamis.com

1-800-65-JAMIS (655-2647) email info@JAMIS.com
or visit us on the web at www.JAMIS.com