



# CRM Software Review



## About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for C2 CRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

## About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

**Contact us for the full, detailed 20-page CRM Software Review for C2 CRM or any of 30 other major CRM applications.**

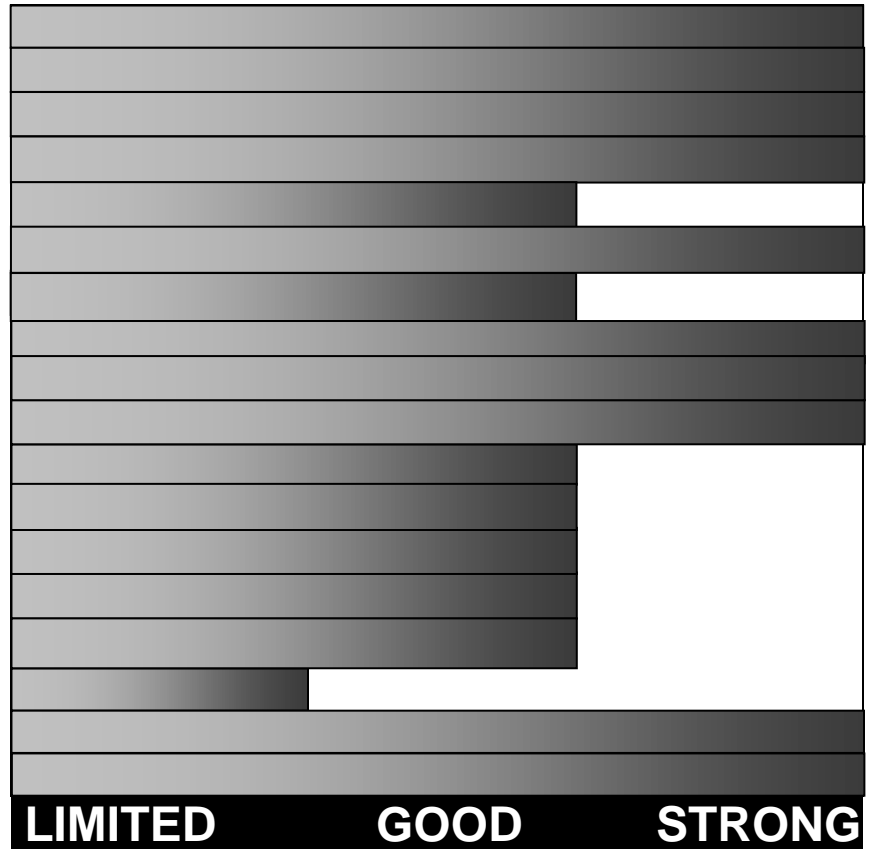
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## C2 CRM at a Glance:

### Business Functions

Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
Business Analytics	✓
e-Business	✓
Project Management	✓
ERM	✓
Field Service	✓
Mobile CRM	✓
Social CRM	✓
Real Time Features	✓
User Friendliness/Support	✓

### Evaluation of Business Functions



**Strengths:**

- Contact Management
- Account Management
- Sales Management
- Time Management
- Customer Service
- Marketing
- Lead Management
- Business Analytics
- Real Time Features
- Project task/deliverables
- Online customer behavior analysis

**Weaknesses:**

- Lack of interactive calendar
- Lack of workforce management
- Lack of storefront
- Lack of order/transaction processing
- Lack of cross selling

## Executive Summary

C2 CRM is a Web-based CRM enterprise application that is strong in contact management, account management, sales management, time management, customer service, marketing, lead management, real time features and business analytics. It offers good functionality in the area of field service, customer contact center, telemarketing/telesales, e-Business, project management and employee relationship management. Because of the Domino back-end, Lotus Notes integration is particularly strong.

## Contact & Account management

Contact management is strong and is supported by an organizational chart created dynamically via a HTML report to show roles and hierarchical relationships to a contact within a company. Account management is strong and is supported by an order entry function that can capture orders from remote users and notify the customer that the order was placed via an automatic Email. Quotes and proposals can be generated via a built-in proposal generator. Quotes can be transformed into sales contracts. Users can view closed, open, and historical contracts by region, account manager, company, or any other pre-defined search criteria. Contract templates can include pre-defined terms including: sales contract, non-disclosure agreements, support or service contracts and financing agreements. Users can record comments specific to the contract.

## Sales management

Sales management is strong and is supported by a lease management function that allows the user to track a customer's assets (e.g. computer hardware) and the lease expiration dates which can be tracked to automatically notify both the customer and account representative as lease terms approach renewal periods via business rules. Time management is strong and offers bi-directional integration with MS-Outlook.

## Customer service

Customer contact center is supported by the ability to access instant messaging and chat via IBM's Sametime Instant Messaging and Chat Engine, which is included with each C2 license. Internal employees can engage in "chat sessions" or ask for advice from supervisors while they are on the phone assisting customers. Customer service is strong and is supported by the ability to manage an incident across multiple departments. A customer service representative can track "work history" for each complaint by checking for completed tasks (e.g., ticket notification, help-desk follow up documentation, RMA issuance Email, and Web support notification) under the specific incident line item. "Work history" allows organizations to view each individual who has worked on a particular support ticket, the time they spent on the incident, and the results of their efforts.

## Field service

Field service offers comprehensive functionality and is supported by time and expense reporting which allows the user to set up and manage billing and expense reporting on multiple contracts per customer such as block contracts, time & materials, and fixed rate contracts. Reports can be generated for service time by factors such as time billed by service technician, by service code, by route, and by region. Employee billing profiles can be set up for each service technician including billing rates for holidays, weekends, and overtime.

## Marketing

Marketing is strong and is supported by comprehensive functionality including campaign management, marketing encyclopedia, product configuration (M2o), and predictive modeling (Silvon Stratum). A customer engagement tool offers the ability to create HTML Email surveys to be broadcast to customers based upon various business events (e.g. Support Ticket is "resolved" and a customer satisfaction survey is sent out). The customer can fill out the survey within their Email; the results are stored instantly within the C2 database. Additionally, C2 Workflow Agents can be designed to poll all customers monthly and examine their total purchase amounts. Once a particular purchasing threshold has been exceeded, a promotional Email can be sent to that customer offering them a "customer loyalty award" based upon their purchasing history.

## **Lead management**

Lead management is strong and is supported by the ability to track a lead's status and relate it to the source or campaign from which it originated. Additionally, a lead coming in via a Web page can be tracked and information downloaded by the prospect (via an organization's Website) can be automatically recorded in the account history as a completed "task".

## **Business analytics**

Business analytics is strong and is supported by statistical modeling tools which provided the ability to access a demand planning and forecasting engine that includes the ability to perform true statistical analysis (e.g., Box Jenkins, Exponential Smoothing, Confidence Intervals, Simple Moving Average, Smooth and Trend parameters). Also, business analytics is supported by digital dashboards displaying key performance indicators (i.e. red, yellow, green).

## **Real time features**

Real time features include a C2 CRM dashboard that can be personalized to include 6 different portlets. Business objects can be created by the System Administrator and placed in the C2 Control Panel via scripting changes in the Presentation layer code. Business objects can also be placed on the C2 CRM dashboard by the System Administrator. Changes within the C2 CRM application can be replicated within a PDA device and afterward viewed in the C2 CRM database.

Workflow capability benefits from the new Process Management module in terms of usability. Also, there is an enhanced search capability that has "Jump to" entities within a view and hyperlinks to related fields and information. E-Business offers robust content management and online customer behavior analysis and reporting. Project management is comprehensive and supported by project task/deliverables tracking.

## **Limitations**

C2 CRM does not offer supply chain management. C2 CRM does not support the launching of third party applications via OLE such as a word processor or a Web browser by clicking on the attached file's icon, but the user can select an attachment from a list of files attached to the record, launch the application and access the file via point and click actions from the list.



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## Contact

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## Company Profile

<b>YEARS IN BUSINESS</b>	21	<b>PRICE – MULTI-USER</b>	See Pricing Section
<b>NUMBER OF EMPLOYEES</b>	55	<b>SERVER</b>	No fees for server
<b>LICENSED SEAT/USERS SOLD – LAST 12 MONTHS</b>	4,200		
<b>TOTAL NUMBER OF CUSTOMERS</b>	399		
<b>LANGUAGES AVAILABLE</b>	French, Spanish, English (US, UK)		
<b>LIST OF RESELLERS</b>	IBM Global Services, Business Objects, Direct Data Corporation, ShowBusiness (UK & European Sales), Silvon Corporation, United Computer Group, MAPSYS, Discovery Solutions, TRIMIN Systems, Software Information Systems, TSG Server & Storage, Strategies & Solutions, Business Integrators, Cherbonnier-Mayer and Associates, ProActive Solutions, Manage Inc., Pinnacle Business Systems, Strategic Technologies, Essex, Retail Store Systems, Aktion Associates, MSI, Midrange Service & Support QCM, Key Information Systems, ICS, Omega		

## Pricing

C2 CRM OnPremise: Small Business Edition - \$625/user  
Professional Edition - \$775/user  
Professional Edition - \$925/user.

C2 CRM OnDemand (SaaS) model: Small Business Edition - \$42/user/month  
Professional Edition - \$52/user/month  
Professional Edition - \$62/user/month.

Server: No Server cost