



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for StayinFront 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 StayinFront CRM or any of 30 other major CRM applications.

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Integrated Customer-Centric Strategies

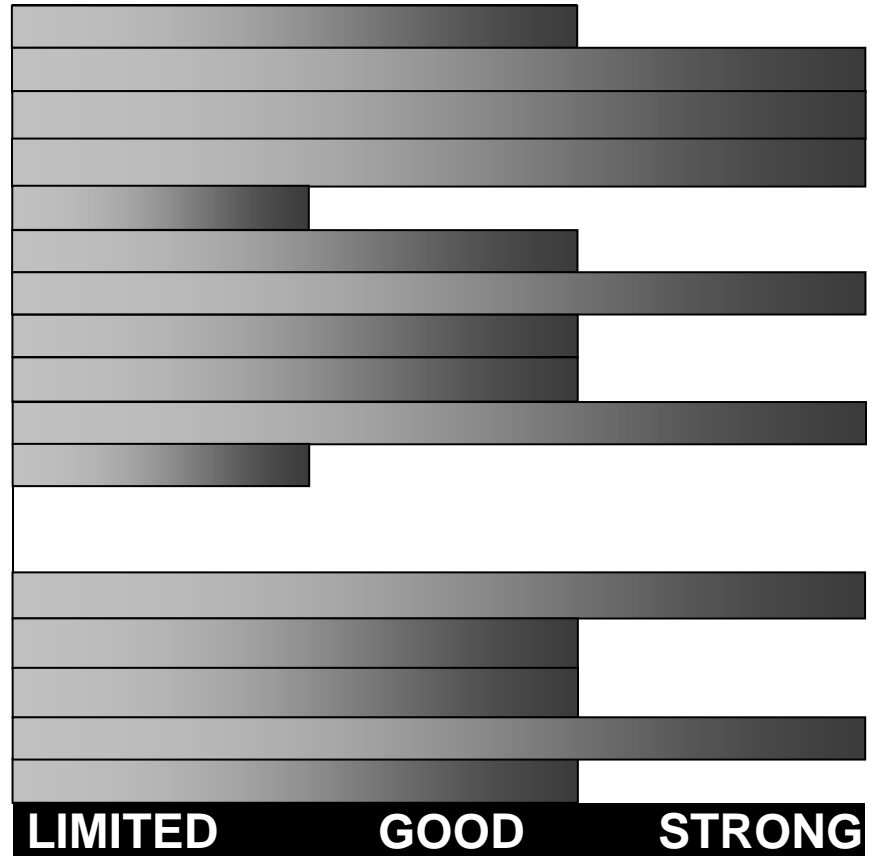
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StayinFront CRM at a Glance:

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 Functionality	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions



Strengths:

- Account Management
- Sales Management
- Time Management
- Telemarketing/Telesales
- Business Analytics
- Real Times features
- Opportunity management
- Sales cycle analysis
- Incident assignment
- Project task/deliverables
- Special events tracking

Weaknesses:

- Lack of project management
- Lack of ERM
- Lack of organization chart
- Lack of predictive modeling tools
- Lack of return materials authorization
- Lack of warranty management
- Lack of eService
- Lack of customer contact center
- Limited e-Business

Executive Summary

StayinFront CRM is a Web-enabled customer relationship management solution that has primary functionality in the areas of contact management, account management, time management, sales management, field service, telemarketing, customer service, marketing, lead management, real time features and business analytics. StayinFront CRM and accompanying add-on modules have been designed to be rapidly configurable by users that do not have software-programming experience.

StayinFront CRM for Windows (LAN) interface screen is similar to that of MS-Outlook. The screen consists of three areas: a View Bar, a Results Tree and a Details Window. The View Bar is positioned within the leftmost field and consists of icons, which can provide access to different screen views set up by the system administrator. The Results Tree displays the hierarchical structure of a database folder, with each file in a folder listed in a tabular format and accessible by a mouse click. A file that is highlighted in the Results Tree will appear in the Details window field. The Details window occupies the rightmost field and can display the contents of the folder (that is highlighted on the Results tree) in a grid, form or Panorama (graphical) view.

Contact management

Contact management features profile fields displayed in a tabular list format, with built-in tabs for notes and call history. The system administrator can create as many user-defined fields or tabs as possible. The user can access a contact's profile by clicking on a particular contact listed in the folder displayed in the Results Tree. The contact's history can be accessed from the Call List tab, which lists all activities related to the contact.

Account management

Account management features configurable via an interface via Studio, StayinFront CRM's development toolkit. The sales cycle analysis is provided via Panorama, an attached information analysis module. The Panorama module allows the user to analyze each sales opportunity by stage, forecast value, potential value, number of potential opportunities and probability of closure.

Sales management

Sales management supports opportunity management and is also configurable via Studio. The add-on Opportunity Management System (OMS) module contains eight built-in stages to be used in the sales methodology for an opportunity. The user can add additional selling stages or customize the eight built-in stages in the OMS. The Opportunity Wizard can walk the user through the appropriate sales methodology in an opportunity. The elements for the sales methodology and sales cycle analysis used for an opportunity, such as the stages, probability of closure and potential value can be customized via Studio. The Sales Opportunity Funnel can graphically display an analysis of sales cycle stages and compare actual cycle times with the forecasted sales cycle times via the Velocity function.

Time management

Time management tools can be accessed from the built-in calendar. Bi-directional integration with MS-Outlook is also available. The user can drag and drop activities from a contact's call list to his/her daily diary of activities. The user can also set an alarm (i.e., pop-up window) to remind him/her of the activity. Telemarketing is available via an add-on module.

Customer service, Marketing management

Customer service and marketing features are available via configuration with Studio. Incidents can be automatically assigned by criteria set up in the Automatic Assignment feature. Marketing encyclopedia functionality is provided by storing and accessing documents, literature, photos, brochures, etc. within the StayinFront CRM database or over the Internet via the add-on Knowledge Browser module. The user is able to mail merge invitations to invitees to a scheduled event and track the acceptances and declines to the scheduled event. Special events can be managed

by creating and tracking trade shows, seminars and direct mailings via the add-on module, Event Management. The user can set up the place, time and duration of the event via the Gantt chart feature. Additionally, users can track the number and names of the invitees whom have accepted or declined the invitation for the event, and travel plans for individuals (e.g., airline arrivals, departures, hotel arrangements) via the Arrival, Departure and Hotel tabs.

Field service

Field service is supported by call handling giving users a view of a service representative's calendar for scheduling purposes, remote inventory for PDMA, problem resolution with keyword search by subject and resolution and time and expense reporting.

Business analytics

Business analytics features are enhanced by the ability to access various graphical and statistical tools in Panorama. Panorama provides ROLAP data analysis capabilities including drag and drop of elements to include in a graph/chart/table as well as drill down on graphs and tabular items. The user can additionally use the functions in Report Wizard to create pre-defined and user-defined reports. The add-on Web Works portal can serve as a direct link for news feeds, external Websites and company database information.

Customization

StayinFront now provides a UML based business process modeling engine called StayinFront CRM Workflow Designer, which makes designing workflows very straightforward. The configuration tool is object oriented and helps speed the process of doing configurations to the application components.

Limitations

StayinFront CRM is a robust CRM solution, but lacks employee relationship management and project management capability. StayinFront CRM is limited in the areas of customer contact center, PRM and e-Business.



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Company Profile

YEARS IN BUSINESS	21	PRICE – MULTI-USER	See Pricing Section
NUMBER OF EMPLOYEES	850	SERVER	\$10,500
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	15,000		
TOTAL NUMBER OF CUSTOMERS	145 companies		
LANGUAGES AVAILABLE	14 languages including English (US, NZ), French, Dutch, German, Italian, Spanish, Greek, Korean, Mandarin Chinese and others. Contact vendor for additional languages		
LIST OF RESELLERS	Contact vendor for a list		

Pricing

The average price per user is \$1,600 - \$1,700/seat.