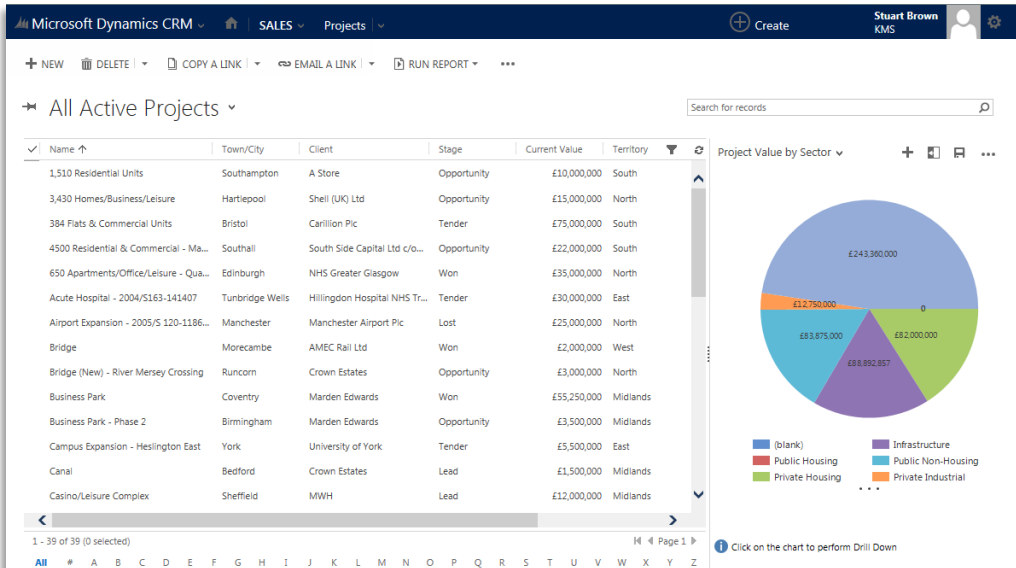


## Project-CRM: Manufacturing Businesses and Distributors

### KMS: Setting the Industry Standard for CRM within the construction industry

KMS have developed the CRM solution for companies involved in the construction industry. By building on 20 years' experience of serving this marketplace, along with the latest Microsoft technologies, KMS have created a solution which is seen as a **'game changer'** in the world of CRM and construction.



**KMS** Works the way the Construction Industry does.

**KMS** Works with your existing processes.

**KMS** Works with your existing technology.

#### Projects

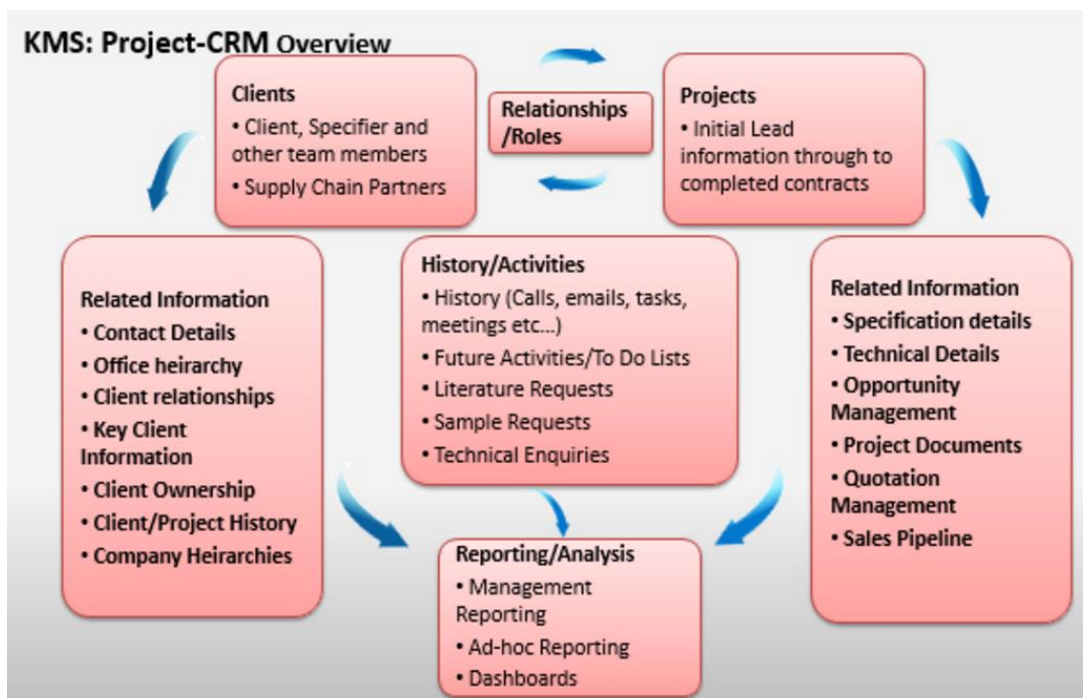
- ✓ Project Lifecycle Tracking
- ✓ Project Activity Recording
- ✓ Bid Recording and Management
- ✓ Document Management Integration
- ✓ Risk Assessment Workflows

#### Companies

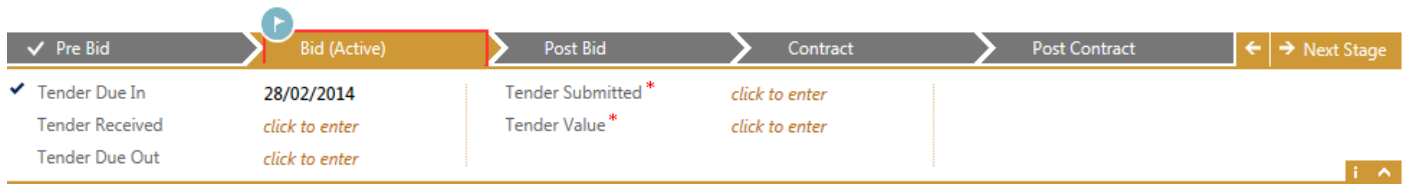
- ✓ Key Client Management
- ✓ Company Relationship Management
- ✓ Contact Management
- ✓ Social Media Integration
- ✓ Supply Chain Recording & Management

#### Sales

- ✓ Sales Opportunity Tracking
- ✓ Specification Recording
- ✓ Quote Management
- ✓ Direct Mail/Email
- ✓ Sales Team Management
- ✓ Target Setting



## Business Development and Marketing



Process driven Opportunity Management helps users capture the right information at the right time to progress each Project Lead through the steps you identify in your own business processes.

Get more leads and close more business with KMS Project-CRM. Access a complete view of customer data online or offline, and leverage tools that enable your sales professionals to get real time access to leads. They are then able to identify, cross-sell and up-sell opportunities and close more deals faster.

- Lead and Opportunity Management
- Account and Contact Management
- Territory/Region Management
- Forecasting and Sales Analytics
- Customer Segmentation
- Campaign Planning and Execution
- Data Extraction
- Analytics and Reporting
- Marketing and Business Development Collaboration Tools

### Projects

Get a comprehensive view of your current project pipeline.  
Track Project opportunities from initial lead right through to completion.

- Project Tracking
- Work intake reporting
- Team identification
- Activity recording and planning
- Project document management

### Bid/ Tender

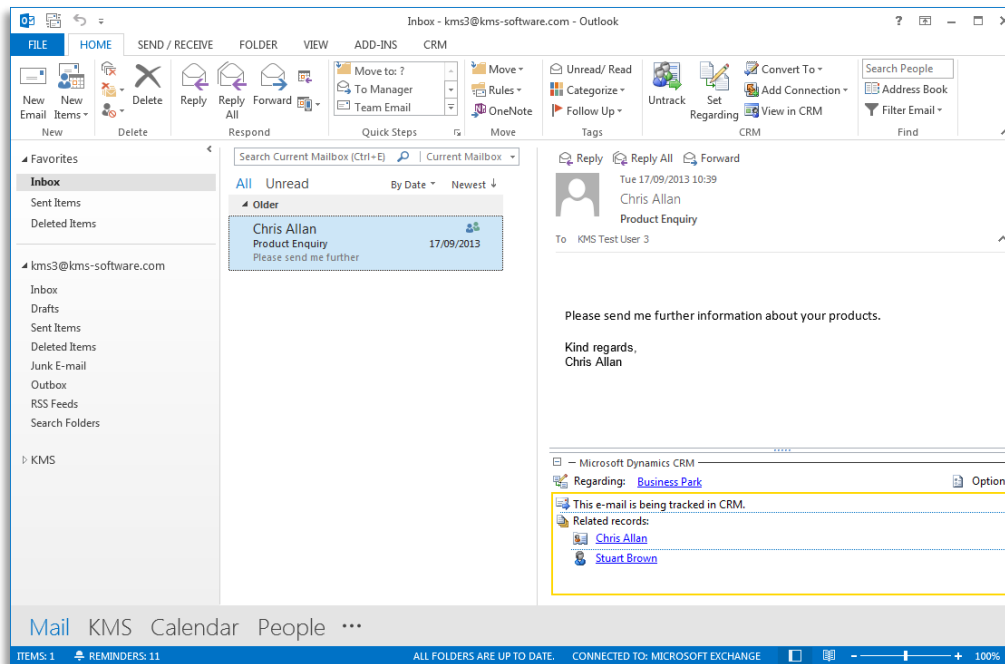
Keep track of all your bid/tender details and ensure your information is all in one place.

- Record bid/tender details.
- Create packages of work (opportunities).
- Pipeline forecasting
- Analyse success rates and monitor competitors
- Performance monitoring

### Marketing

A clearer view of customers and more informed marketing investments.  
Segment customer lists into distinct benefit groups and then market to one or more of the identified segments using a workflow-driven model.

## A Familiar Experience



### MS Outlook

A brand new client completely revamped for Dynamics 365. With many familiar features but with lots of new additions. You can now take advantage of native outlook grids, reading panes, categories, filters, support for multiple organisations and much, much more.

### CRM and Email Appointments

In the Outlook client, you are given contextual CRM information about the particular email that you are tracking! For all of the contacts on the email, right from your Reading Pane, you see the related record links in CRM. These links are organised by record type for easy reading and you can click on these links to open up the CRM forms and if one of the recipients isn't in CRM? They will come up in red fonts showing that they are unresolved. You will be one click away from creating them right from your inbox.

### The Smartphone and Tablet Experience

Whether you are in the office or on the go KMS' Project CRM can be accessed where ever you are. With new applications for the iPad and Windows 8 tablets along with phone applications for the iPhone, Android and Windows phone, it has never been easier to input and extract information as if you were sat at your desk in the office.

Project-CRM also offers Cross Browser Compatibility so you don't need to change the way you would usually work, whatever your preferred browser, you will still have access to the same features and capabilities.

#### Fits your IT Strategy

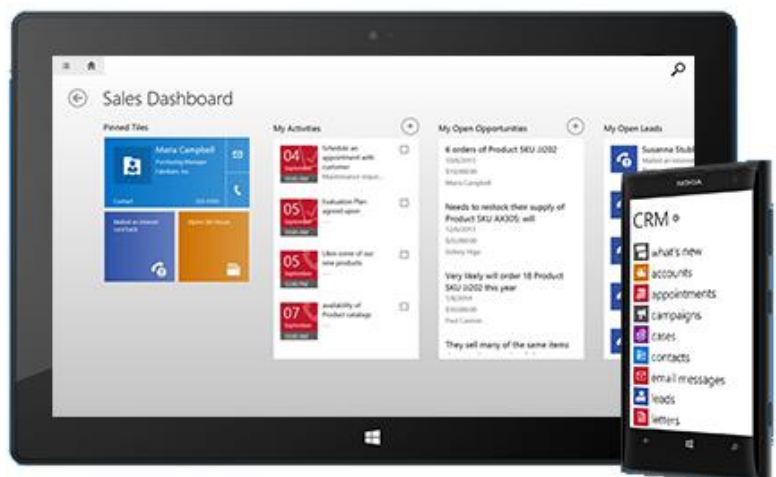
Project-CRM is available Online, Hosted or On Premise.

#### Access

Information can be accessed where ever you are. Through your Microsoft Outlook, iPhone, iPad, Smart Phone or Tablet.

#### Cloud Development

Project-CRM, the construction industry solution for Microsoft Dynamics 365, is the leading edge of Cloud computing which uses groups of servers and scalable resources over the internet.



## Project-CRM: What Can It Do For You?

Name	Town/City	Postal Code	Client	Current Value	Stage	Sector	Owner	Territory	Currency
1,510 Residential Units	Southampton	SO19 9RR	A Store	10,000,000	Opportunity	Private Housing	James Unler	South	Pound Sterling
3 430 Homes/Business/Leisure	Hartlepool	TS24	Shell (UK) Ltd	15,000,000	Opportunity	Private Housing	Stuart Brown	North	Pound Sterling
384 Flats & Commercial Units	Bristol	BS1 6BX	Carillon Plc	75,000,000	Tender	Infrastructure	KMS Support	South	Pound Sterling
4500 Residential & Commercial	Southall	UB1 1QZ	South Side Capital Ltd c/o	22,000,000	Opportunity	Private Housing	Stuart Brown	South	Pound Sterling
Acute Hospital - 2004/S163-14140	Tunbridge Wells	TN2 4QJ	Hillingdon Hospital NHS T	30,000,000	Tender	Public Non-Hous	Stuart Brown	East	Pound Sterling
Bridge (New) - River Mersey Cross	Runcom	WA7 1	Crown Estates	3,000,000	Opportunity	Infrastructure	Stuart Brown	North	Pound Sterling
Business Park - Phase 2	Birmingham	B1 1BP	Marden Edwards	3,500,000	Opportunity	Private Commer	Stuart Brown	Midlands	Pound Sterling
Campus Expansion - Heslington	York	YO10 5DD	University of York	5,500,000	Tender	Private Commer	Stuart Brown	East	Pound Sterling
Canal	Bedford	MK40	Crown Estates	1,500,000	Lead	Infrastructure	Stuart Brown	Midlands	Pound Sterling
Casino/Leisure Complex	Sheffield	S9 1EP	MVH	12,000,000	Lead	Private Commer	Stuart Brown	Midlands	Pound Sterling
Childrens Home	Bury St. Edmunds		Spelthorne Council Office	12,000,000	Lead	Public Non-Hous	Stuart Brown	East	Pound Sterling
City Centre Redevelopment - Broad	Bristol	BS1 3E	Turley Associates	15,000,000	Opportunity	Public Non-Hous	Stuart Brown	West	Pound Sterling
Commercial Offices	Nottingham		Marden Edwards	40,000,000	Tender	Private Commer	Stuart Brown	Midlands	Pound Sterling
gatwick bloc					Opportunity	Infrastructure	Trial User?	South	Pound Sterling
Industrial Units	Oldham	M35 0	Manchester Airport Plc	12,000,000	Lead	Private Industrial	Stuart Brown	North	Pound Sterling
Industrial Warehouses	Stevenage		London 2012	750,000	Tender	Private Industrial	James Unler	South	Pound Sterling
Jeffs BBQ	York				Opportunity	Private Industrial	James Unler	Central	Pound Sterling
Jeffs Garden	Oklahoma City	OK 73101			Lead	Public Non-Hous	KMS Support	South	Pound Sterling
Lisa House			Marden Edwards	2,000,000	Lead	Public Non-Hous	KMS Support	North	Pound Sterling
My Test Project				1,000,000	Lead	Infrastructure	KMS Support	South	Euro
NHS Practice extension	Ipswich	IP1 3LJ	British Paralympic Assoc	4,850,000	Lead	Public Non-Hous	Stuart Brown	East	Pound Sterling
Office Refurb	Derby	DE11	Centrica Plc	2,250,000	Tender	Public Non-Hous	James Unler	Midlands	Pound Sterling
Offices - Fluid	Liverpool	L2 2DY	Marseytravel	1,250,000	Opportunity	Private Commer	Stuart Brown	North	Pound Sterling
School (Extension)	Redhill		Ewan Group Plc	5,000,000	Opportunity	Public Non-Hous	James Unler	South	Pound Sterling
Tesco Superstore	Nottingham	NG4 1EB	Tesco Stores Limited	360,000	Tender	Private Commer	Stuart Brown	Midlands	Pound Sterling
UK-Beverly: electrical equipment and apparatus					Tender	Public Housing	Trial User?	South	Pound Sterling

## What is Advanced Find and How Can It Work For You?

KMS Project-CRM includes advanced find functionality that allows users to create complex queries in order to return specific datasets. Once a set of data is isolated, the user can do many different CRM actions. Several common examples are listed below:

- Work with the precise set of data in a variety of ways (e.g. edit, bulk email, etc.)
- Export the data to Excel to do further analysis. If the data is exported in a "dynamic" fashion, users can refresh the data within Excel. Many users also use the export

to Excel feature in order to create a template to use when importing data in the future.

- Create a saved view. A saved view allows you to see your queries criteria in a personal view to use in the future. If others would find it useful, then it's very easy to share with other users.

## Highly Customisable To Fit Your Business

Configure your own views, fields and templates to suit your business requirements. Project CRM works the way you work and can be adapted to show your specific needs with easily accessible tabs that will take you straight through into your required area in as few clicks as possible.

## Security

Grant specific rights to different groups of users by role and control the actions different users have the power to take within the CRM system. This security can also be applied to an individual field to ensure that sensitive or secure information can be protected. A full Audit Trail also records which users made updates to each individual record and what information was changed.

## KMS Data Import Tool

KMS have developed a tool that will allow you to import information from a 3rd Party Data Project Supplier directly into Project CRM with an unprecedented ease of use. This allows you to be able to reach more prospect business in a shorter time span and once the information has been entered into CRM it can be easily tracked and monitored.

## Services

At KMS we understand that the software is just part of the process. In order for the implementation to be a long-term success, your organisation's people, technology, and business processes need careful consideration.

KMS Consultancy ensures your system is deployed with your specific business and people in mind, rather than just installing the 'standard' setup and hoping for the best. From initial requirement mapping and system planning, through to achievable timescales, the KMS Consultancy Team works with you to deliver a system that can realistically deliver your aims.

### Reporting

- SSRS Reports
- Dashboards
- Advanced Find-Export to Excel
- Work Intake
- Ad-Hoc Reporting

### Existing KMS Customers

Aliaxis  
 Contour Casings  
 Lindapter International  
 Jaga Heating UK  
 Dolese Bros Co.  
 and many more...