

CRM CENTERED AROUND THE CUSTOMERS YOU KNOW AND TRUST

Introducing new powerful Customer
Relationship Management features in
Unanet A/E, powered by Clearview



Unanet[™]

A/E

Powered by Clearview

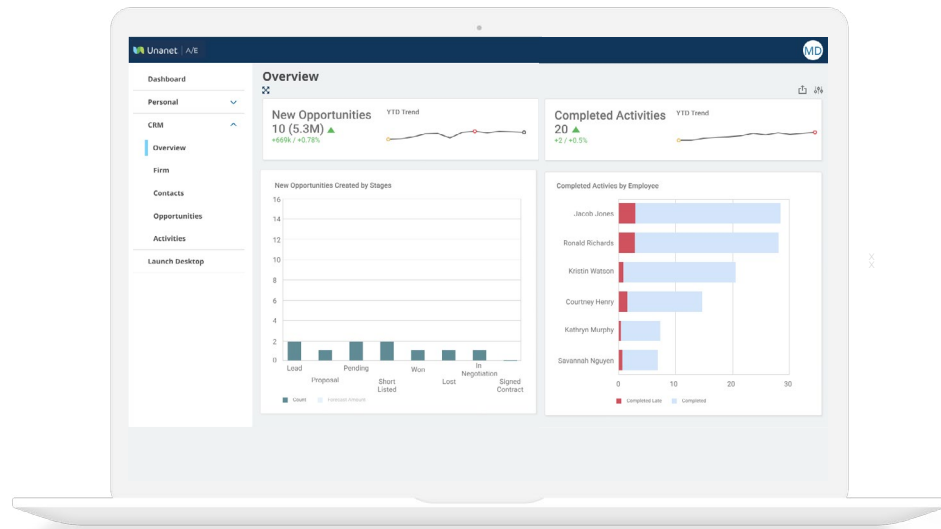
Unanet A/E, powered by Clearview, provides a web-based Customer Relationship Management solution that allows you to easily track and nurture client relationships, manage CRM and opportunity efforts, and improve opportunity tracking.

With CRM in the web, your firm can enjoy better customer relationships, increased pipeline visibility, more quality wins, and reduced cost by removing the need for third-party software. Unanet A/E CRM aligns your relationship and pipeline data with accounting and project data, providing a true project-based CRM platform centered around the clients you have come to know and trust.

POWERFUL FEATURES TO TRANSFORM YOUR CRM

CRM

- Project-based CRM that aligns your data from contacts and pursuits to projects and profitability
- Powerful CRM dashboards provide staff with immediate, in-context feedback on CRM efforts and enable them to centralize on built-in KPIs
- Real-time insights and detailed CRM info empowers your sales team to improve relationship management
- Management can visualize, track, and measure CRM and pipeline effort across Business Development, Sales, and Marketing

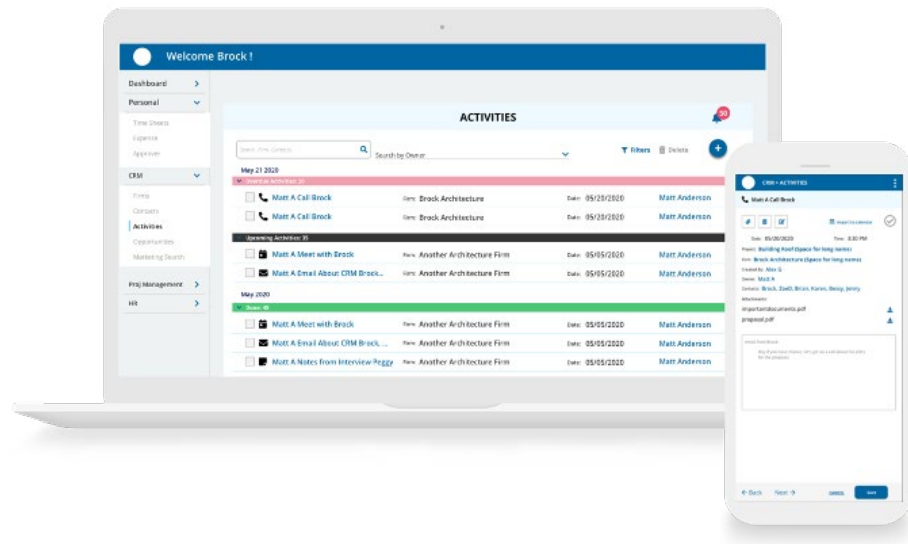


OPPORTUNITIES

- Visual, filterable pipeline and easy data entry provide sales management and staff with smooth pipeline management and the ability to prioritize key pursuits
- Gain insights for project wins and future pursuits with detailed pipeline history
- Painless and informed hand-off from BD to PM
- Firms can Job Cost their Opportunities to measure true cost of project
- In-depth, real-time management and search of opportunity details with related CRM info
- Seamless view of related activities, contacts, employees, and other CRM data for more wholistic pipeline management
- See scheduled, overdue, and completed activities related to your opportunities, providing decision support for task management and priority pursuits

ACTIVITIES

- Manage business development efforts from top of funnel through close by creating and managing actionable to-do items
- Pipeline-based task management with clear visibility into ongoing opportunity efforts and priority next steps
- Gives Sales and Business Development Managers insight into actionable next steps for key engagements
- Record your CRM efforts and scheduled follow up, completely aligned with ongoing opportunity data
- Schedulable tasks provide easy-to-use task management for business development teams



FIRMS & CONTACTS

- Better visibility into sales and business development team efforts allows you to effortlessly see who is working with contacts and opportunities
- Comprehensive firm history enables staff to be more prepared for customer conversations
- Gain a more holistic picture of your contact network and improve nurture efforts with photos, additional contact info, and links between related contacts
- Real-time search and management of contact and firm info in-context with related contacts, documents, and other CRM data
- Consolidated page for internal contacts with related details on their opportunities, assigned firms, and assigned activities
- Easily add and manage contact and firm details on-the-go



Unanet serves more than 2,000 businesses with its ERP software solutions purpose-built for professional service organizations. Unanet’s software helps project-driven organizations reliably plan, track and manage projects, people and financials. Unanet’s customer-centric culture means we strive to deliver insights with personal service.



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