![Unanet logo]

Unanet CRM + Outlook

Get all the benefits of CRM delivered right in your inbox

Challenge

You use email to build and maintain the relationships that drive business. But you also need a CRM to manage these relationships and track the opportunities which flow from them and keeping the CRM up to date can be a chore.

What if there was a way to seamlessly blend the two so you can get all the benefits of your CRM while in the tool you use to actually connect with your clients, customers, and partners?

Solution

Imagine leveraging the power of your firm's CRM data as you connect with contacts, clients, and partners in Outlook. You could quickly understand your firm's entire history with anyone mentioned in an email, including previous touchpoints they've had with your company, past work your firms have done together, and more.

Now, imagine it was just as easy to share data back with your colleagues. If you could seamlessly add new contacts, schedule meetings, and update opportunities in your CRM as you go through your email - without ever leaving Outlook. And if all of it was secure, easy to configure and MS GCC-High compatible?

With Unanet CRM, you don't have to imagine!
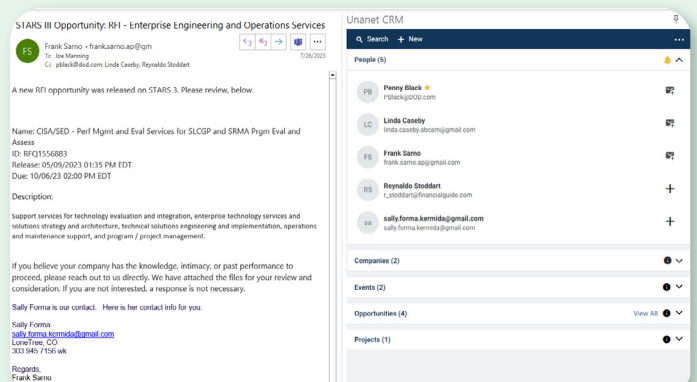
Experience all the benefits of your CRM without having to go to your CRM

Unanet CRM brings all the data and insights from your CRM directly to your Outlook inbox. While you are reading and sending emails, you can grow contacts in the CRM, get relationship insights from the CRM, sync calendar invites with the CRM, and more—all without leaving Outlook. This lets you keep your CRM up to date without having to update your CRM!
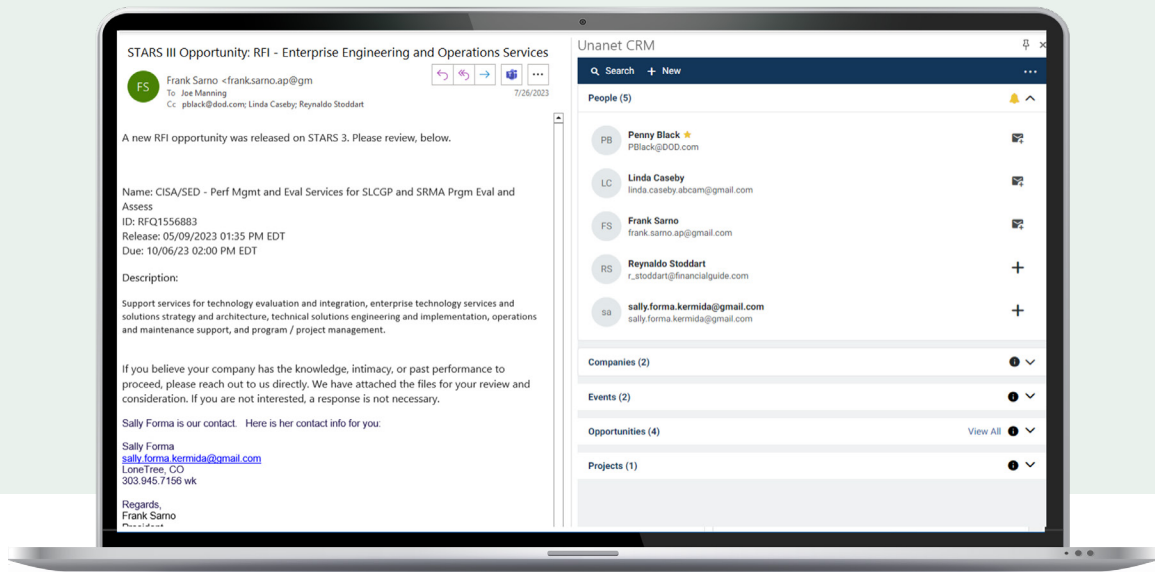
Add email contacts to Unanet CRM with a single click

- Unanet CRM scans your emails for new and existing contacts and companies, showing you which ones are already in your CRM and which ones aren't.

- Add new contacts to the CRM with a single click (with automatic duplicate checking to ensure data integrity).

### Get instant relationship insights on the people and companies in an email

- View past and current projects and opportunities your firms have worked on together.

- Identify who in your company already has a relationship with a contact.

Effortlessly add, track, and schedule emails, meetings and other touchpoints

- Easily add emails to opportunities in your CRM as well as add, track, and schedule business development touchpoints for you and your colleagues.

- Sync Unanet CRM and Outlook calendar events so everyone is always in the loop.

Manage your pipeline more effectively

When your pipeline information is spread out across individual spreadsheets and emails, it can be difficult to have informed, strategic conversations internally. With Unanet CRM's Pipeline View Add-in, you can manage and monitor your pipeline directly from Outlook. As you take each opportunity through its entire lifecycle, the CRM is automatically updated, keeping everyone across your organization informed, aware, and on the same page.
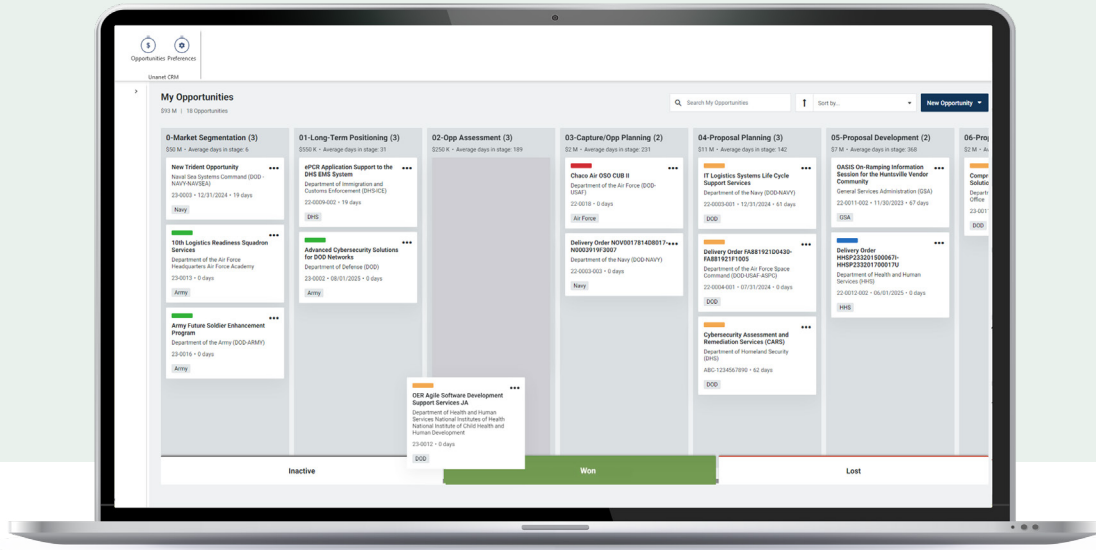
Create and edit opportunities and more right from Outlook

- Create new contacts, companies, opportunities, and leads from within Outlook using easy, pre-populated forms. You can easily link related touchpoints, like call logs or emails.

- Opportunities appear as cards in the Pipeline View so you can see your entire pipeline on one screen. Open a card to view/ edit more information from the CRM about the opportunity.

Configure opportunity cards to show the data that matters most to you

- Choose which data is displayed on your cards so you can see the current status of all your opportunities at a glance.

- Use color-coded flags to identify opportunities by category, risk, and/or strategic value so you can easily find and understand what's happening with the key elements of your pipeline.

Effortlessly update your pipeline from Outlook

- Drag and drop opportunities from stage to stage and the CRM is automatically updated.

- When you move an opportunity to a new stage, you can conveniently add any new information required for that stage so it always remains up to date.