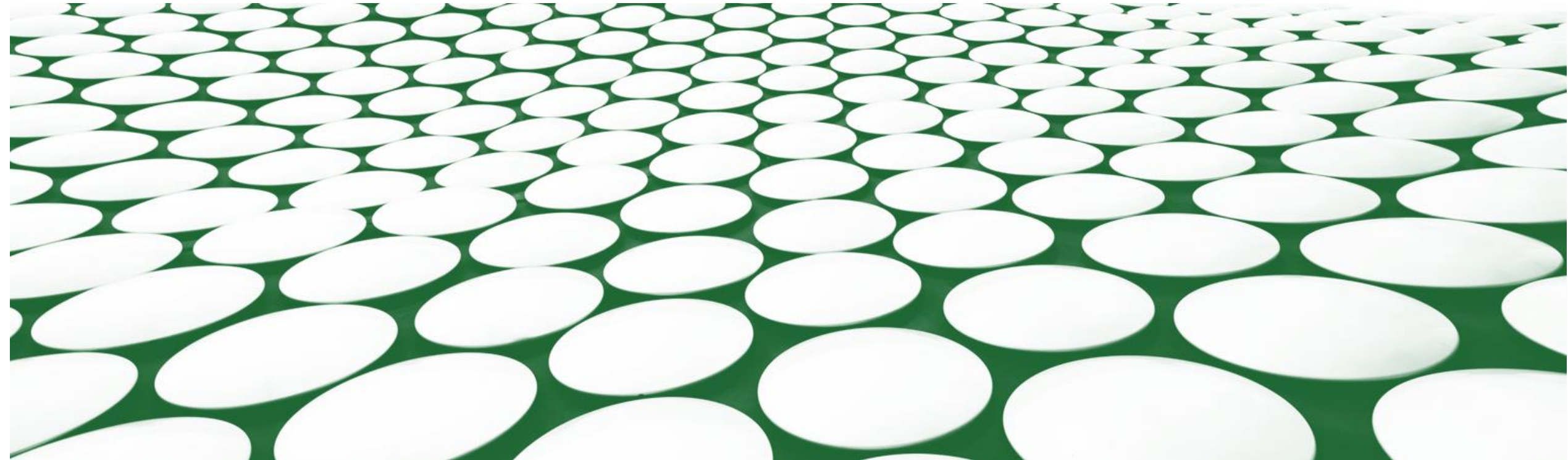

EXPLORING CRM

PRESENTED BY: VENITA BROWN AND RJ PETERSEN

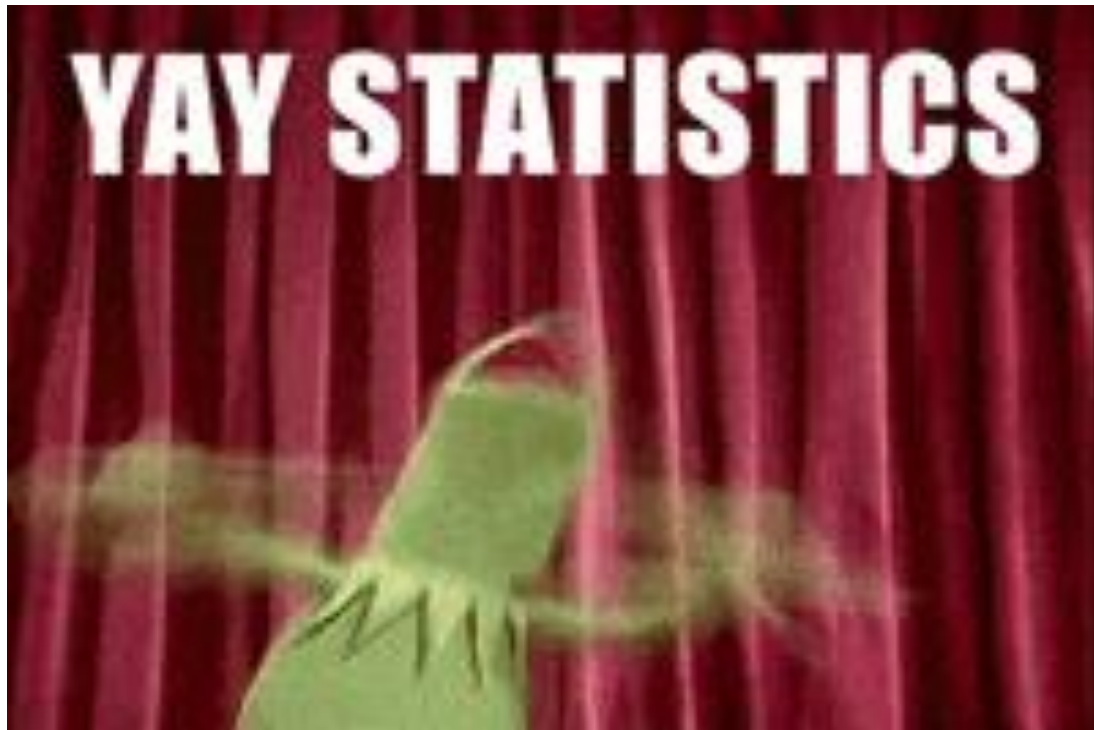


WHAT IS CRM?

- New app launched by RFMS
- Customer Relationship Management (CRM) is used to manage the pre-sales pipeline
- Available for Windows, iOS, and Android devices



FUN STATISTICS ABOUT CRM SOFTWARE



3 KEY CRM STATISTICS

1

Crucial CRM features that professionals look for

Source: Inside CRM



3 KEY CRM STATISTICS

2

ROI benefits experienced by businesses using CRM systems

Source: IBM



improved customer
relationships



increased sales
quota



improved
productivity



labor cost
reduction

3 KEY CRM STATISTICS

3

Benefits of using mobile CRM applications

Source: Forrester Research



improvement in sales

87%



increase in customer satisfaction

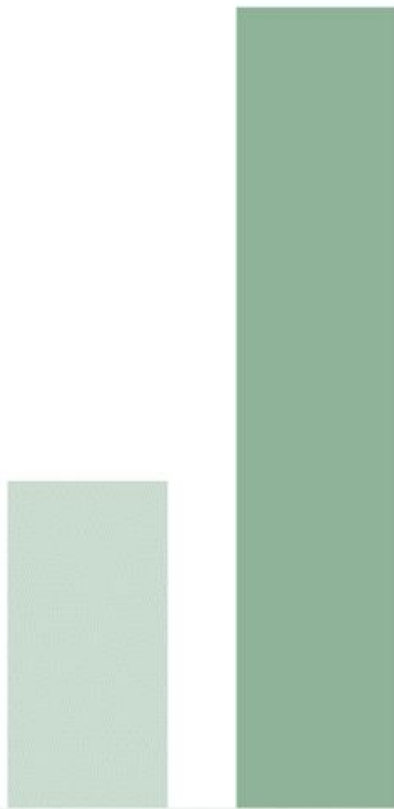
74%



improvement in business process efficiency

73%





A properly integrated
CRM can provide a
245% ROI.

Source: Forrester

MORE STATISTICS

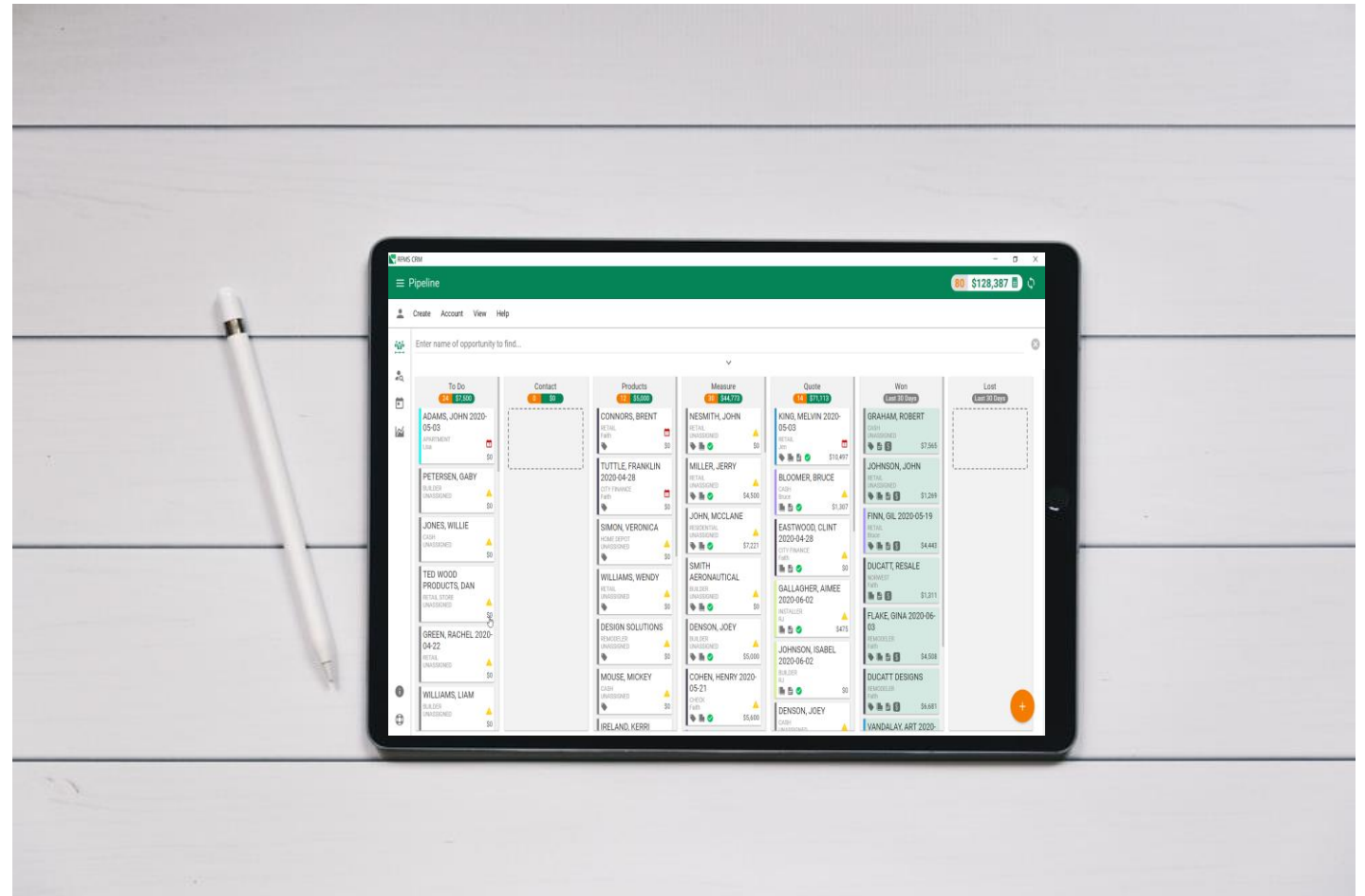
- 50% of teams using a well-integrated CRM see improved productivity. (*Forrester*)
- For every dollar spent on CRM, the average company sees an \$8.71 return. (*Nucleus Research*)
- CRMs can boost sales by 29% and productivity to 34%. (*Salesforce*)
- 24% more sales pros meet their annual quotas when they have mobile access to their CRM. (*Aberdeen Group*)

WHAT CAN CRM DO?



WHAT DO I NEED TO GET STARTED?

- CRM requires a mobile device with internet connection
- Measure Mobile and RFMS Mobile
- RFMS Measure Service installed on your server
- Download the app from App/Play/Microsoft store search 'RFMS'



TOP 6 FEATURES IN RFMS CRM



1

Organize your sales reps



2

Close more sales with a more consistent workflow



3

Communicate with your customer fast, easy, and on their device.



4

Send proposal to customer and capture approval electronically



5

Integration with Measure Mobile and RFMS Mobile and Outlook/calendar



6

Leaderboard to monitor your top performers

ORGANIZE YOUR SALES REPS

Opportunities are in lanes for fast and easy viewing and editing

Icons indicate reminders and milestones for the opportunity.

RFMS CRM

Pipeline 68 \$111,888

Create Account View Help

Enter name of opportunity to find...

Lane	Count	Total Value
To Do	10	\$18,299
Contact	6	\$5,456
Products	3	\$5,000
Measure	32	\$36,663
Quote	17	\$46,470
Won (Last 30 Days)	-	-
Lost (Last 30 Days)	-	-

To Do

- SMITH, JACOB (RETAIL, Bruce) \$1,000
- BLOOMER, BRUCE 2020-07-30 (CASH, Bruce) \$0
- WHEAT, TERRY 2020-05-04 (BUILDER, David Quinn) \$4,500
- CLASSIC DESIGNS 2020-04-28 (REMODELER, Faith) \$5,000
- COHEN, HENRY 2020-06-11 (CHECK, Faith) \$6,300
- GREEN, RACHEL 2020-04-22 (RETAIL)

Contact

- PETERSEN, GABY (BUILDER, David Marshello) \$0
- TED WOOD PRODUCTS, DAN (RETAIL STORE, Cindy) \$5,000
- PETERS, DAN (APARTMENT, Cindy) \$456
- JONES, WILLIE (CASH, David Quinn) \$0
- WHEAT, JACOB 2020-05-05 (REMODELER, Jacob Wheat) \$0
- RAWLIGS, ALLYSON 2020-08-18 (CASH, Kerri) \$0

Products

- TUTTLE, FRANKLIN 2020-04-28 (CITY FINANCE, Faith) \$0
- PARKER, LISA 2020-05-03 (BUILDER, Lisa) \$5,000
- SIMON, VERONICA (HOME DEPOT, Tony Cargill) \$0

Measure

- SMITH AERONAUTICAL (BUILDER, Cindy) \$551
- COHEN, HENRY 2020-05-21 (CHECK, Faith) \$5,600
- DENSON, JOEY (BUILDER, Joey) \$5,000
- PETERSEN, RJ 2020-04-30 (CASH, Kerri) \$0
- NESMITH, JOHN (RETAIL, Patti) \$458
- CONNORS, BRENT (RETAIL, Faith) \$0

Quote

- JOHN, MCCLANE (RESIDENTIAL, Bruce) \$7,224
- KING, MELVIN 2020-05-03 (RETAIL, Jen) \$10,497
- KENNEDY, DEBBIE (REALTOR, Cindy) \$759
- EASTWOOD, CLINT 2020-04-28 (CITY FINANCE, Faith) \$0
- KENNEDY, DEBBIE 2020-06-10 (CASH & CARRY, RJ) \$2,924
- JOHNSON, ISABEL 2020-06-02 (BUILDER)

Won (Last 30 Days)

- GRAHAM, ROBERT (CASH, UNASSIGNED) \$7,565
- JOHNSON, JOHN (RETAIL, UNASSIGNED) \$1,269
- WHEAT, STEPHEN 2020-07-27 (CASH, Bruce) \$3,563
- WHEAT, STEPHEN 2020-07-28 (RETAIL, Bruce) \$4,581
- DUCATT, RESALE (NORWEST, Faith) \$1,311
- VANDALAY, ART 2020-05-03 (RETAIL, Jen) \$497

Lost (Last 30 Days)

- TAYLOR, KELLY (BUILDER, Bruce) \$0
- BLOOMER, BRUCE (CASH, Bruce) \$1,307

ORGANIZE YOUR SALES REPS

Dashboard shows them their work and recent activity at quick a glance

The screenshot displays the RFMS CRM Dashboard with a green header and a sidebar. The main content area is divided into three sections: Upcoming Appointments, Pending Tasks, and Recent Activity.

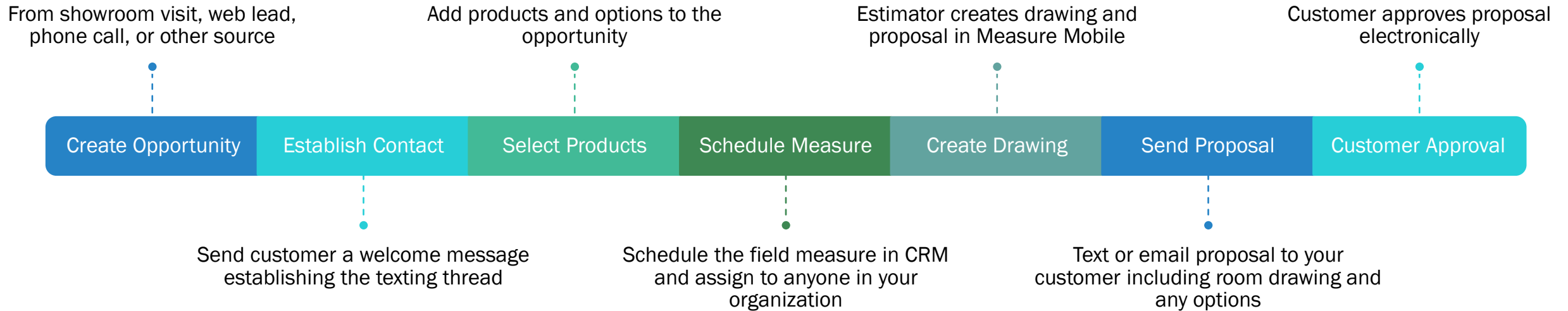
Upcoming Appointments: Shows a large coffee cup icon and the text "No upcoming appointments".

Pending Tasks: Lists one task: "Order samples" by PETERSEN, GABY, due 2 months ago.

Recent Activity: A list of activities with dates and details:

- June 22, 2020**
 - 6/22/20 2:38 PM: SMITH, CHRIS 2020-06-22 (Quote)
 - 6/22/20 11:05 AM: SMITH, CHRIS 2020-06-22 (Quote Created: ES010025)
 - 6/22/20 11:04 AM: SMITH, CHRIS 2020-06-22 (Drawing Created: SMITH, CHRIS 2020-06-22)
- June 10, 2020**
 - 6/10/20 12:07 PM: KENNEDY, DEBBIE 2020-06-10 (Measure)
 - 6/10/20 11:58 AM: KENNEDY, DEBBIE 2020-06-10 (Proposal Approved: View: https://myflooringlink.com/#/view/660d6fe307624b59900d181ec183d9ba, Signature: Signed by Dk. IP address: 68.117.5.103, Machine name: 68.117.5.103, Browser info: Mozilla/5.0 (iPhone; CPU iPhone OS 13_4_1 like Mac OS X) AppleWebKit/605.1.15 (KHTML, like Gecko) Version/13.1 Mobile/15E148 Safari/604.1)
 - 6/10/20 11:53 AM: KENNEDY, DEBBIE 2020-06-10 (Drawing Created: KENNEDY, DEBBIE 2020-06-10)
- June 2, 2020**
 - 6/2/20 11:48 AM: JOHNSON, ISABEL 2020-06-02 (Proposal Approved: View: https://myflooringlink.com/#/view/683e59e71b37449b929a86eaf3528ce7, Signature: Signed by Hzhandb. IP address: 71.86.202.191, Machine name: 71.86.202.191, Browser info: Mozilla/5.0 (iPhone; CPU iPhone OS 13_4_1 like Mac OS X) AppleWebKit/605.1.15 (KHTML, like Gecko) Version/13.1 Mobile/15E148 Safari/604.1)

CRM WORKFLOW



COMMUNICATE WITH YOUR CUSTOMER

- RFMS CRM has built in texting capability
- Why text and not email?
 - **Text open rates** are nearly 5 times that of email.
 - 98% of all **text messages** are **read**
 - 20% of emails read
 - In other words, when you send **text messages**, recipients actually **read** them.

<https://techjury.net/blog/sms-marketing-statistics/#:~:text=SMS%20open%20rates%20are%20nearly%205%20times%20that%20of%20email.&text=98%25%20of%20all%20SMS%20messages,messages%2C%20recipients%20actually%20read%20them.>



COMMUNICATE WITH YOUR CUSTOMER

- New leads start as an opportunity
- You can start texting with the customer at any stage
- Messages are stored in the opportunity and other staff can see/reply to messages

ES **CHAT**

Start Chat

Your Company

RFMS Trainer Demo

Your Phone

2052466007

Your Name

RJ

Message 

Hi John! Thanks for stopping in today. When you are ready to schedule a measure please reply to this message.

Mobile number

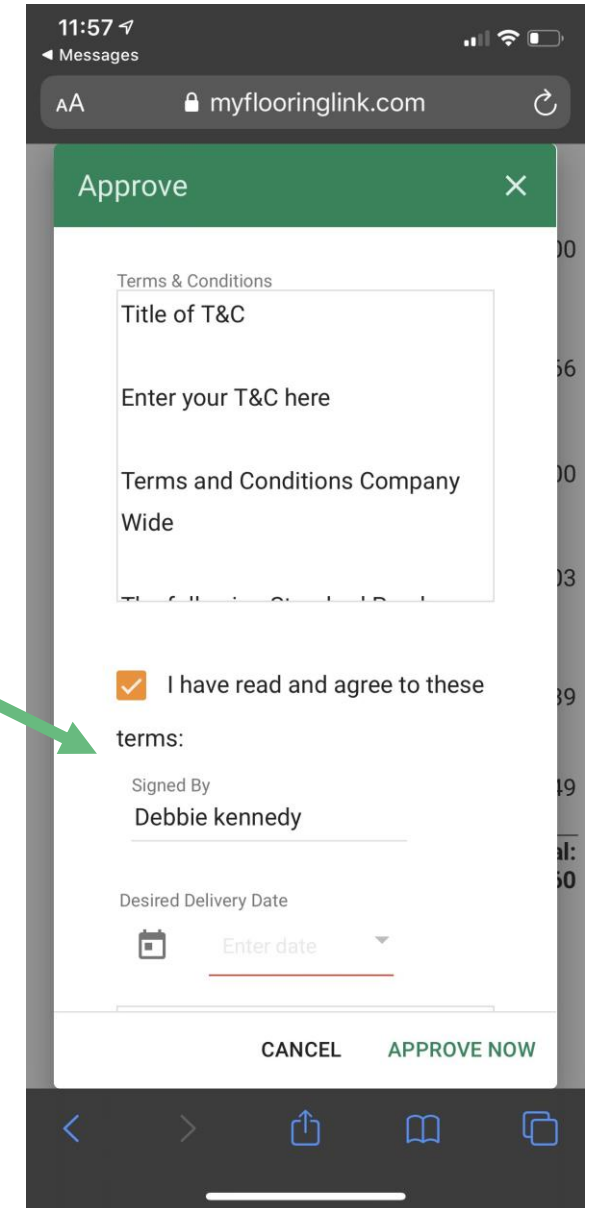
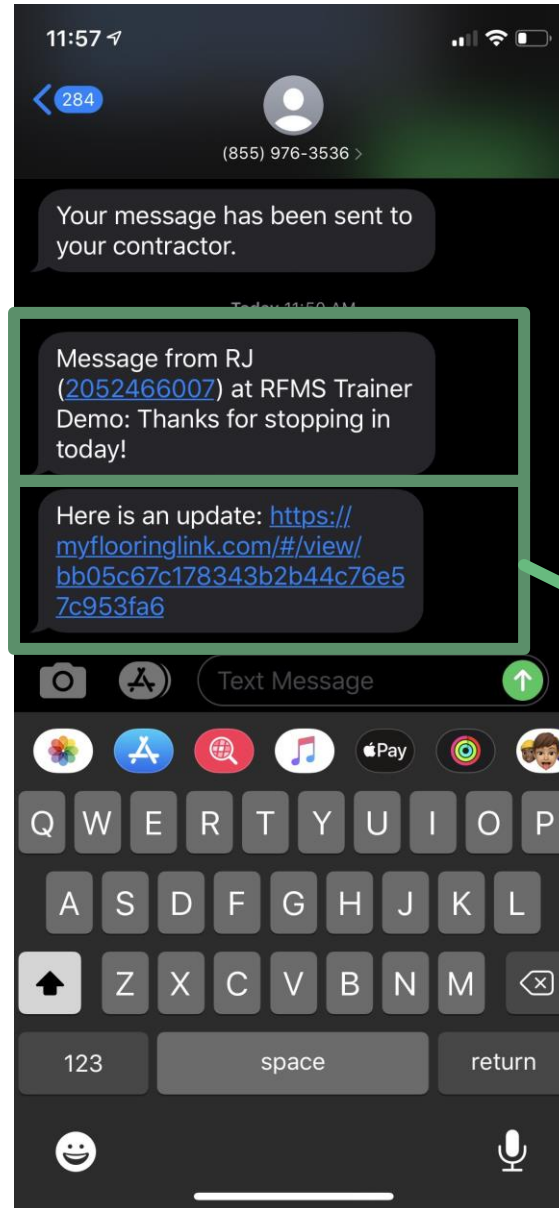
9202512560

CANCEL

START

SEND PROPOSAL TO CUSTOMER AND CAPTURE APPROVAL ELECTRONICALLY

- Each opportunity generates a unique text thread for your customer.
- You can send and receive messages through the app.
- Customer texts you like any other text message.
- When ready you can share products and proposals with your customer





Conduct safe, no-contact client consultations with RFMS Mobile Apps

As flooring retailers adjust to conducting business in this new normal, RFMS is here to provide the tools you need to make your job easier and provide your clients with the sense of safety and assurance they need.



INTEGRATION WITH MEASURE MOBILE

Create a measure and assign to your estimator.

Easy and fast Measure scheduling!

The screenshot shows the 'New Measure' form in the RFMS CRM. The form includes the following fields and sections:

- Name:** PETERS, DAN
- Shipping Address:** (Dropdown menu)
- Estimator:** Rahul (highlighted with a green box)
- Measure Date:** 08/21/2020
- Time:** 12:00 PM (highlighted with a green box)
- PO Number:** (Field)
- Job Number:** (Field)
- Private Notes:** (Text area)
- Based on Template:** A list of templates including Builder Package 1, Shop At Home, The Other Best Template, Jacob's Measure Mobile, Comm, Builder Package 2, Test FD, Residential, and The Best LTemplate.

A calendar popup is displayed over the 'Measure Date' field, showing the date 'Aug 21, 2020 - Rahul' and the message 'No events scheduled'. The popup is also highlighted with a green box. At the bottom right of the form, there are 'CANCEL' and 'CREATE' buttons.



OVERVIEW **PIPELINE** ACTIVITIES CHAT



Title
NESMITH, JOHN
Created
Apr 6, 2020 9:41:39 PM

OPEN MEASURE



Measure files are linked to the opportunity in CRM

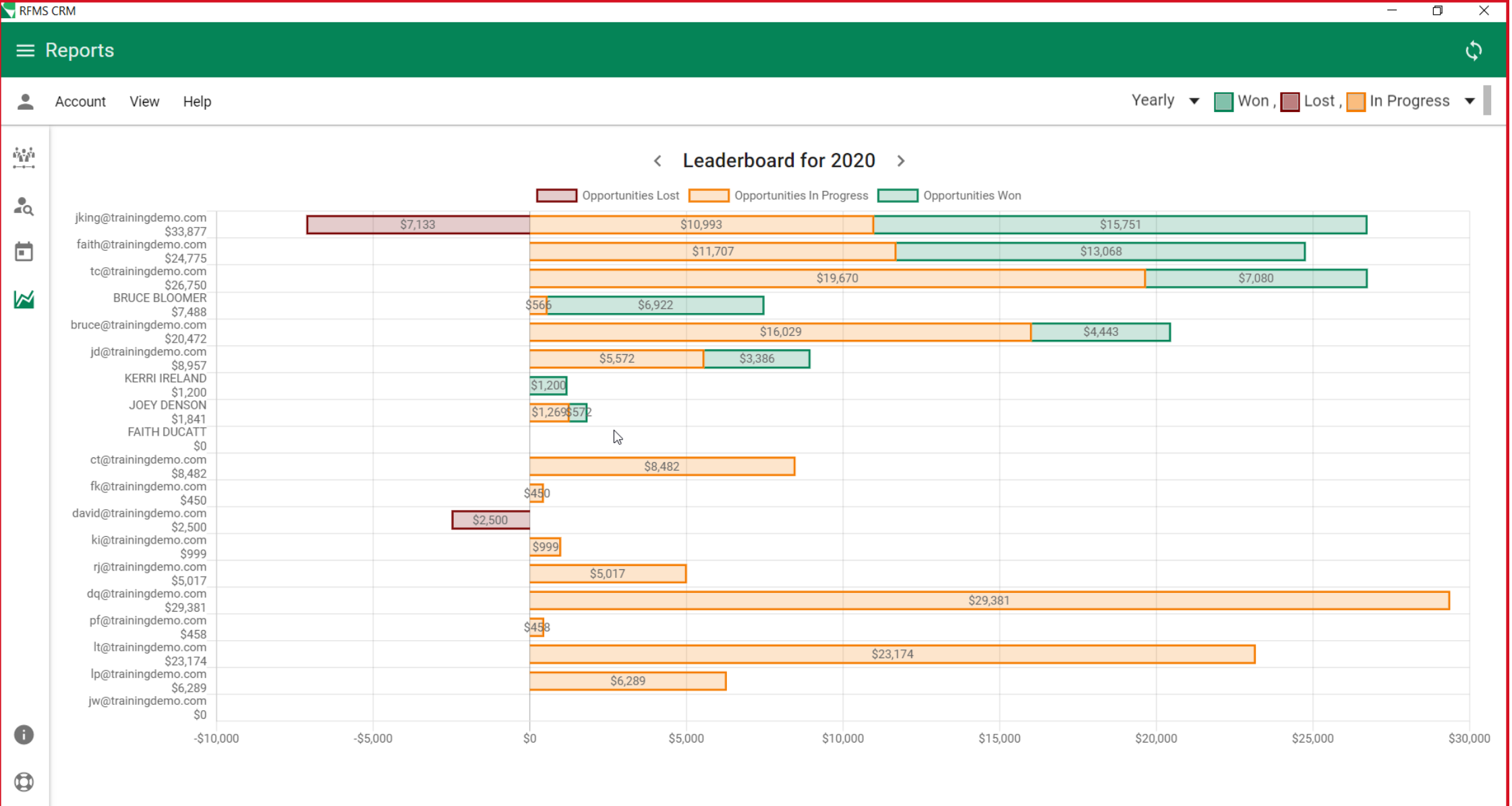
INTEGRATION WITH MEASURE MOBILE AND RFMS MOBILE

INTEGRATION WITH MEASURE MOBILE AND RFMS MOBILE

- CRM designed to work with our other apps.
- Schedule measure for your estimator
- Share Measure Calendar with Outlook or other calendar apps
- Create Measure project for use on Measure Mobile and Measure Desktop
- Seamlessly transfer products and room names from CRM to Measure Mobile
- Create Quote and Export Quote to Orders



LEADERBOARD TO MONITOR YOUR TOP PERFORMERS



INTRO TO RFMS VIRTUAL SERVICES



RFMS
Virtual

Virtual Estimation Service

Let our team of expert and experienced estimators perform quality and accurate estimates for your project by outsourcing your projects, you can increase the number of bids submitted and increase your chances of winning more jobs. It is also possible to submit multiple bids for a project.



MEASURE

RFMS

Virtual Products Management

Up-to-date product records can boost productivity and deliver better customer experiences. Now Virtual Products Management can save you time and guarantee that your product records are always up-to-date!



RFMS 2020 Workshops are Now Virtual



Your favorite RFMS workshops are back! RFMS is now offering our popular training workshops in a virtual setting, keeping you safe, all while saving you the time and cost of travel.





STAY IN TUNE WITH THE FUTURE

Hilton Downtown Nashville

April 19-21, 2021

rfms.com/conference

2021 OWNER & EDUCATION
APRIL 19-21

Nashville
RFMS

RFMS TRAINING SERVICES

- One-on-one Online Training
- Coffee and Conversation series on Thursday mornings
- Mini-Workshops on Tuesday afternoons
- Replay recorded events
- All available at rfms.com, training tab

The screenshot displays the RFMS website header and a navigation menu. The RFMS logo, featuring a red square with a white triangle and the text 'RFMS Systems for Success', is positioned on the left. The top navigation bar includes links for 'My Account', 'Support', '1-800-701-7367', and 'Help Desk 1-888-215-8665'. The main navigation menu lists 'PRODUCTS', 'INDUSTRIES', 'TRAINING', 'NEWS', 'COMPANY', and 'INTERNATIONAL'. A search icon is located on the right. The 'TRAINING' menu is expanded, showing a list of training services: 'VIRTUAL WORKSHOPS', 'MINI-WORKSHOPS', 'FREE PRE-RECORDED WEBINARS', 'CLASSROOM TRAINING', 'E-LEARNING', 'FREE TRAINING EVENTS', 'VIRTUAL ACCOUNTING SERVICES', 'B2B TRAINING', and 'OUR TRAINERS'. The background of the website features a blurred image of a red carpet and a laptop screen displaying software.



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OUR CONTACT INFO