



# The Assistant Manager™

## CUSTOMER RELATIONSHIP MANAGEMENT



### Know Your Patrons

Observe patrons' interactions with all areas of your organization. Recognize each time a customer visits, makes purchases, connects with colleagues, attends events, or contributes.



#### 360° View

Automatically record all customer information and historical activity, regardless of business unit, in a single data store.



#### Be Informed

Know each customer's purchasing habits, events attended, interests, contributions, and each time anyone in the organization has communicated with them.



#### Save Time

Centrally store and maintain key metrics on each customer including any demographics, interests, preferences, and relationships.

### Keep In Touch with Your Patrons

Eliminate repetitive tasks, manage to-do lists, and communicate with patrons promptly, professionally, and automatically.



#### Advanced Digital Marketing

Schedule automatic personalized (digital or hard copy) customer communications triggered by their purchases including thank you notes, confirmations, reminder notifications, and survey invitations.



#### Manage Action Items

Assign scheduled customer follow-up tasks or action items and never miss a commitment or opportunity again.



#### View Patron History

Always be informed; instantly view the details of all past interactions with any customer.

### Enhance Every Patron's Experience

Know what makes each patron important and unique to your organization. Nurture each relationship with your customers and continually build loyalty while saving time and effort.



#### Ease of Access

Securely share membership information available wherever needed. Rapidly identify and validate customers to dramatically reduce wait times.



#### Be a Know-It-All

The right hand will always know what the left hand is doing regardless of the business unit involved.



#### Cross Sell Offerings

Never ask your customers to go from one area to another in order to take advantage of any events, product, or service. Let them take advantage of any offering, anywhere, and anytime!

### CRM Adapters

Plug ins that increase this option's capabilities. Adapters can be purchased initially or added later.



#### Reward Program

Design, offer, and manage offer an integrated reward program to your patrons. Produce and deliver reward notifications and validate rewards at time of redemption.



#### Order Management

Process customer orders regardless of channel. Effortlessly manage notification, payment, and fulfillment processes. Integrates with UPS, FedEx, and USPS.



#### Accounts Receivable

Extend house charge privileges to eligible patrons. Produce invoices and monthly statements. Process payments and monitor account status to improve collection efforts.