

## NETSUITE BENEFITS

### Benefits experienced by organizations using NetSuite CRM+ include<sup>1</sup>:

- Improve sales productivity by 15%–20%
- Average productivity gain of 20% for customer service representatives
- Reduction in customer service call resolution times by 30%–60%
- Greater marketing campaign ROI
- Streamlined quote-to-order processes

### NetSuite Customers Include:



**HAMAMATSU**



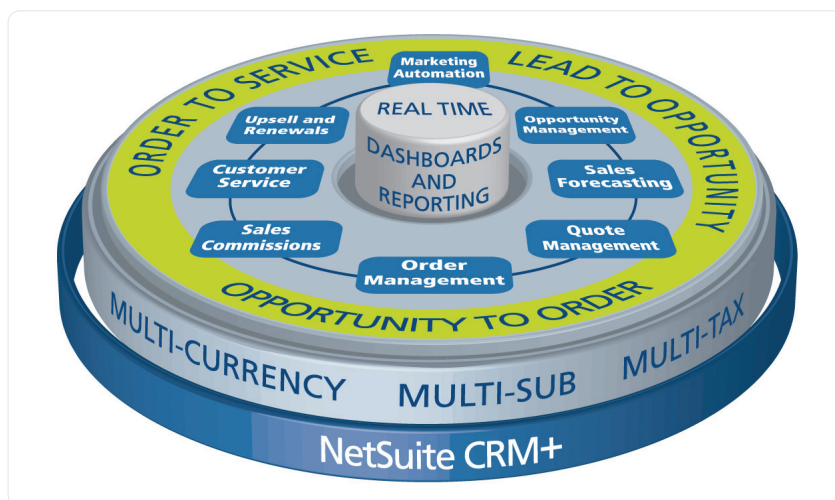
# NetSuite CRM+

## Powerful CRM That Drives The Complete Customer Lifecycle

Since 1998, NetSuite has been enabling businesses to transform their business performance and processes. Now, over 10,000 organizations of every size across a broad range of industries trust their businesses to NetSuite.

NetSuite CRM+ delivers powerful customer relationship management (CRM) capabilities, including sales force automation (SFA), marketing automation, customer support and service, and flexible customization, all in single cloud CRM solution. And unlike typical CRM solutions, NetSuite CRM+ includes powerful sales performance management, order management, partner management and marketing effectiveness capabilities as standard.

NetSuite CRM+ can integrate with your existing ERP investments, providing you with a cloud CRM system woven into your broader business processes, or you can grow into the rest of NetSuite's broader suite by adding seamlessly integrated ERP, ecommerce, professional services automation (PSA), or global business management capabilities when the time is right for your business.



End-to-End Customer Relationship Management

### Why NetSuite CRM+?

- Goes beyond traditional CRM to automate all processes—marketing automation, sales performance management, incentive compensation, partner management, order management, customer service and more
- Completely cloud-based solution, lowering IT costs and empowering your employees to work from anywhere, from any web browser or mobile device
- Drives sales performance management with built-in sales forecasting, quota management, automated commission management and upsell management
- Powerful real-time, role-based dashboards that drive sales, service and marketing visibility
- Delivers a 360-degree view of all customer data and interactions
- Streamlines order management processes and easily integrates with existing ERP investments
- The only cloud CRM solution to capture customer purchase data—putting the “C” in CRM
- Grows with your business—start with CRM, but easily expand to NetSuite's cloud based suite for complete end-to-end business management including ERP and ecommerce
- SuiteCloud platform provides complete customization, together with an ecosystem of value-added SuiteApp partner integrations at SuiteApp.com

<sup>1</sup>Source: Nucleus Research

 To find out more, contact NetSuite Inc. at 1-877 NETSUITE or visit [www.netsuite.com](http://www.netsuite.com).

“With NetSuite our salespeople can organize their workday, and we can deliver sales quotes that are impressively accurate. This provides our customers with truly professional service and allows us to work at top efficiency.”

—Guitar Center Pro

## NetSuite CRM+ Features

### Powerful Sales Force Automation

NetSuite CRM+ provides SFA that equips the sales team with an accurate record of each opportunity and its status, a complete view of the prospect and real-time access to every detail.

- Enables the sales team to manage opportunities across status, potential revenue, key contacts, notes, related documents and more
- Provides sales managers with a complete view of all leads and opportunities in the pipeline
- Comprehensive contact and activity management ensures sales has the tools needed to capture detailed records of all interactions—calls, meetings, notes, email and more
- Enables the sales team to convert opportunities into quotes and then sales orders with one click
- Team selling enables tracking of multiple sales roles in each opportunity, including sales reps and managers, sales engineers and specialists
- Document management functionality enables businesses to build and maintain a sales portal with the latest materials, sales guides and product information

### Advanced Sales Forecasting and Quota Management

NetSuite CRM+ advanced forecasting and quote management capabilities build reliability, predictability and trust into the sales process.

- Opportunities, quotes and estimates include a forecast category that allows users to categorize the transaction appropriately as low, commit or upside
- Probability-based forecasting offers weighted measurement of pending opportunities, quotes and orders, with the ability to make necessary adjustments as deals progress
- Advanced forecasting tools allow sales reps and managers to self-report forecasting at each level for comparison against pipeline and forecast accuracy
- Makes sales more predictable with real-time forecasting and a system of checks and balances that triangulates the sales forecast
- Order management capabilities provide actual sales and projections of recurring revenue in forecasts and variances

### Automated Incentive Compensation Management

NetSuite CRM+ delivers flexible sales compensation management that frees up the sales operations team from time-consuming compensation calculation as well as time spent researching and resolving sales disputes. Dashboards and reports allow you to optimize sales commission spending and effectiveness.

- Easily configure sophisticated sales commission rules based on quotas, sales, quantity, profitability and other criteria
- Set up flexible commission schedules—monthly, quarterly, bi-annually or annually
- Compensation plan flexibility enables easy setup of short-term “SPIFs” to incent specific promotions, as well as supports period-based accelerators
- Provides the sales team with clear visibility into their compensation through summary to detailed commission reports
- Integrates with back-office processes—from sales commission calculation to payment—through NetSuite’s built-in payroll capabilities, or integrates with your existing payroll solution

 To find out more, contact NetSuite Inc. at 1-877 NETSUITE or visit [www.netsuite.com](http://www.netsuite.com).

## NUCLEUS RESEARCH

The typical company deploying NetSuite increased sales productivity by 12.5%, and companies can expect to improve productivity by up to 20%.

“NetSuite CRM+ has helped us very quickly transform from a company with different, inconsistent processes from country to country into an organization with a clear, global view of our resources and performance.”

—Teleca AB

## Comprehensive Upsell, Quote and Order Management

With NetSuite’s order and quote management capabilities, the sales team can easily convert accurate quotes into approved sales orders, which then flow to your finance system for processing.

- Includes intelligent upsell management in the order-capture process to provide recommendations based on previous buying patterns
- Improves quote and order accuracy by including automated tax and shipping-rate calculations
- Incorporates pricing and discounting rules automatically into the quote process, enabling real-time quote management
- Supports price-level flexibility, including automated quotes based on volume discounts, negotiated pricing, tiered levels, etc
- Accelerates the order management process with online approval and workflow management

## Anytime, Anywhere Mobile Access

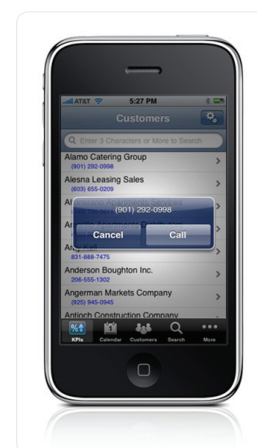
NetSuite’s comprehensive support for mobile devices—iPhone, BlackBerry or Android (provided by both NetSuite and NetSuite SuiteCloud partners)—ensures that your sales users get real-time access to the business information they need.

- Access the latest business reports and business metrics
- Manage calendar information and accept/decline meetings
- See customer and opportunity details

## Integration with Leading Social and Productivity Tools

NetSuite integrates with standard social solutions such as Yammer and Qontext using its SuiteSocial platform, improving collaboration and overall sales productivity. In addition, NetSuite integrates with leading email and productivity tools such as Microsoft Outlook and Google Apps.

- SuiteSocial integration with Yammer and Qontext supports Twitter-like cross-departmental collaboration around opportunities, orders and other transactions
- Microsoft Outlook integration supports calendar and contact synchronization
- Google Apps integration (via Celigo) supports calendar synchronization and contextual access of NetSuite information from within Gmail



Access Sales and Customer Data from Anywhere

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“NetSuite has helped us increase our customer service and ultimately customer satisfaction.”

—Innovise Software Division (UK)

## Out-of-the-Box Marketing Automation

NetSuite CRM+ automates your entire marketing process across channels, allowing you to better align campaigns and programs with your sales efforts. NetSuite is the only solution to provide true closed-loop ROI reporting, from the campaign cost to the actual revenue driven from it. NetSuite CRM+ enables you to easily target, build, execute and measure the success of marketing campaigns and takes the complexity out of lead qualification and conversion.

- Enables execution and tracking of campaigns rapidly and in real time to maximize the value of your leads and opportunities
- Automates lead capture from multiple sources, including websites, search engines, email, direct mail and events
- Delivers email marketing—from creation to execution to measurement—in one system
- Features full reporting and drill-down to analyze campaign statistics and ROI from the start of a campaign to the final order transaction
- Provides rules-based workflow tools to improve lead conversion by automatically managing and driving lead nurturing programs
- Supports upsell marketing through analysis of historical purchasing combinations or product affinities, providing the perfect foundation for upsell campaigns

## Partner Relationship Management

NetSuite CRM+ provides full control over every element of the partnering process, including joint marketing campaigns, lead management, sales forecasting, pipeline management, order processing, and partner commissions and royalties.

- Lead management enables partners to register and track their leads
- Supports accurate, up-to-the-minute partner sales forecasts
- Provides full visibility into all of your partners' leads, orders and sales activities

## Customer Service and Support

NetSuite's call center capabilities assign, track and escalate cases to serve customers more quickly and efficiently, while NetSuite's 360-degree customer view gives service and support reps better visibility into customer issues and even empowers them to upsell and cross-sell to drive more business.

- Case management automates the business processes associated with customer support case assignment, management and escalation
- Supports routing and tracking support cases according to product, issue, case type, partner or customer
- Knowledge base helps customers get the answers they need, aids customer rep training and education, and drives service consistency
- Real-time dashboards and reporting to quickly identify percent of calls resolved, monitor first-call resolution (FCR) metrics, analyze customers renewing maintenance, track call volume and trends, and monitor customer satisfaction
- Online self-service enables customer case submissions, status tracking, communications and more

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“With NetSuite, everything is ‘now’—the instant access to information is incredible.”

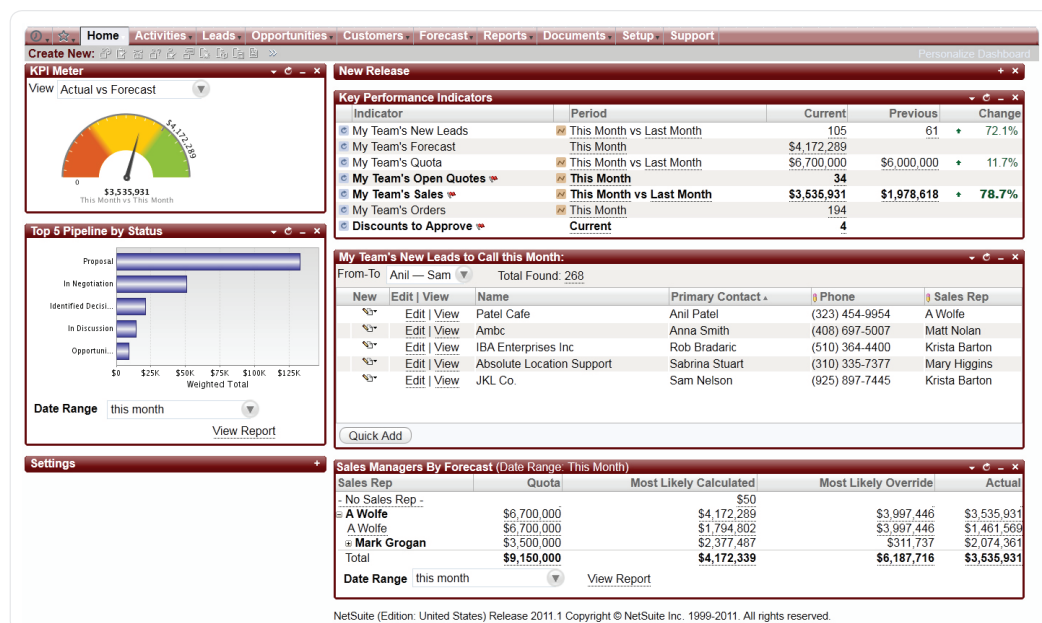
—Simon Ellison  
Sales and Marketing Director  
Computer Warehouse

## SuiteCloud Platform

### Real-Time Dashboards, Reporting, Analytics and Planning

NetSuite delivers built-in, real-time role-based dashboards, reporting and analytics enabling your sales, marketing and service teams to monitor personalized key performance indicators (KPIs) and access the latest reports as part of their everyday activities. And with NetSuite, they can diagnose issues on the fly with drill-down visibility to the sales opportunity, customer record or sales quote detail to quickly take action and drive results.

- KPI scorecards enable continuous sales performance measurement
- Sales teams get instant access to key measures such as achieved versus quota, actual versus sales forecast, sales pipeline by stage, percent of net new customers versus those up-sold, commissions and more
- Service teams can quickly monitor key metrics on call resolution times, customer satisfaction and renewals, call volumes and trends, and more
- Marketing teams get instant lead-to-close metrics, number of website unique visitors, lead-generation trends, customer acquisition costs and more
- Self-service reporting ensures everyone can create their own reports and manage their performance



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Comprehensive Dashboards, Reporting and Analytics for Sales, Service and Marketing

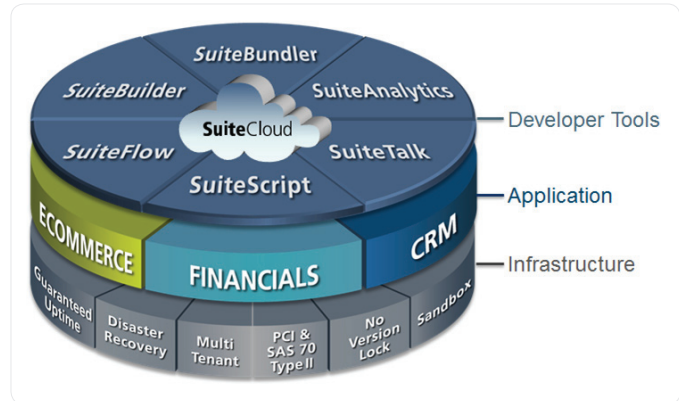
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“NetSuite is flexible enough for us to affordably customize it to fit the company’s long-term needs.”

—Hallelujah Acres

## Flexible Customization Using SuiteCloud Platform

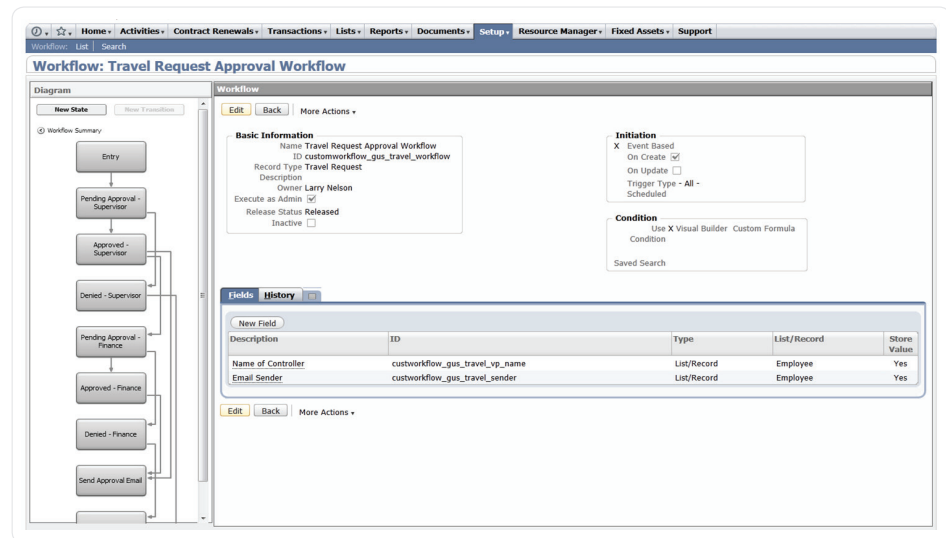
NetSuite provides limitless cloud customization to adapt to business change, including sophisticated forms management, graphical workflow management, scripting, web services and more. Businesses that run NetSuite can customize with confidence, as all customizations automatically migrate with every new NetSuite release.



NetSuite SuiteCloud Provides a Complete Customization Platform

## Graphical Workflow Management and Approval

With SuiteFlow, part of the SuiteCloud Platform, power users can quickly create point-and-click, rules-based workflows that automate and streamline business processes—such as creating rules-based lead nurturing, sales order approval chains, travel approval workflows and more.



**Workflow: Travel Request Approval Workflow**

**Diagram**

**Workflow Summary**

```

graph TD
    Entry --> PendingApprovalSupervisor[Pending Approval - Supervisor]
    PendingApprovalSupervisor --> ApprovedSupervisor[Approved - Supervisor]
    ApprovedSupervisor --> DeniedSupervisor[Denied - Supervisor]
    DeniedSupervisor --> PendingApprovalFinance[Pending Approval - Finance]
    PendingApprovalFinance --> ApprovedFinance[Approved - Finance]
    ApprovedFinance --> DeniedFinance[Denied - Finance]
    DeniedFinance --> SendApprovalEmail[Send Approval Email]
  
```

**Basic Information**

Name: Travel Request Approval Workflow  
 ID: customworkflow\_gus\_travel\_workflow  
 Record Type: Travel Request  
 Description:   
 Owner: Larry Nelson  
 Execute as Admin: ☒  
 Release Status: Released  
 Inactive: ☐

**Initiation**

☒ Event Based  
☐ On Create: ☒  
☐ On Update: ☐  
☐ Trigger Type: All - Scheduled

**Condition**

☐ Use X Visual Builder  
☐ Custom Formula  
☐ Condition  
☐ Saved Search

**Fields**

Description	ID	Type	List/Record	Store Value
Name of Controller	customworkflow_gus_travel_vp_name	List/Record	Employee	Yes
Email Sender	customworkflow_gus_travel_sender	List/Record	Employee	Yes

SuiteFlow Provides Click-Not-Code Workflow Management

## Advanced Cloud Customization

SuiteTalk and SuiteScript, part of the SuiteCloud Platform, provide comprehensive web services and procedural logic to support integration and custom business logic, enabling global businesses to weave NetSuite into internal and external systems, and tailor it to support specific business processes. A set of third-party solutions at the SuiteApp ([www.suiteapp.com](http://www.suiteapp.com)) partner directory offers you additional flexibility to enrich and extend NetSuite.

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Best Business Software Solution  
Best Relationship Management Solution  
Best Cloud Infrastructure Software



ISM Top 15 CRM Winner



Best Cloud Application 2010



Customer Interaction Solutions  
Product of the Year