

# Gain a 360 Degree Customer View with QAD CRM

- Improve Customer Satisfaction
- Accelerate Sales Success
- Grow Revenues

March 9, 2022 2:00 PM Eastern



# Gain a 360 Degree Customer View with QAD CRM

## Today's Panel



Manager, Solution Architecture

**Martin Shertzinger**



Sr. Solutions Architect

**Amy Vasquez**

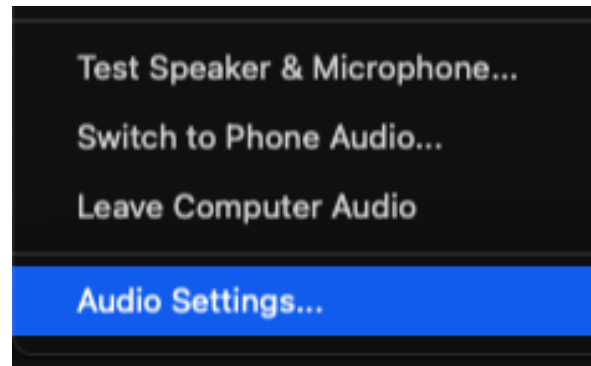
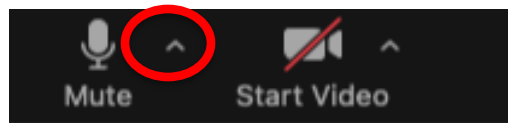


Sr. Director, Marketing

**Barbara Ware**

# Zoom Event: How to Participate

- Join or Change Audio:
  - Click arrow next to Mute button
  - You have the options to set microphone and speakers, test them, adjust volume or switch to phone audio
- Full audio settings allows you to and change other settings



# Why Strategic? QAD CRM?



Manager, Solution Architecture  
**Martin Shertzinger**

# About us:

- **Established:** 1992
- **Employees:** 115+
- **Locations:** USA (5), Ireland, UK  
India, Thailand
- **Customers:** 1200+ Companies
  - 750+ full implementations
  - 400+ life science customers
  - 150+ reached exit strategy
- **Products**
  - QAD Adaptive ERP
  - Quality Management Systems
  - ERP Integration Adaptors & Extensions
  - FDA Validation Toolkits/Protocols
- **Services**
  - Implementations
  - Integrations
  - Upgrades
  - Managed Services (QAD and EDI)



- QAD Help Desk (helpSERV)
- Staff Augmentation

# Why Strategic And QAD Cloud CRM?

- We specialize in helping small companies grow exponentially, and large(r) companies gain efficiencies in their processes
- Experts in QAD Adaptive Enterprise ERP
- Tools that provide efficiency & automation are critical
- CRM provides access to all customer information for improved customer service and more efficient sales cycles
- Improve customer satisfaction, accelerate sales success, grow revenues

# COMPLETE

Customer Management

Lead to trusted business partner

Simple to complex – trade pricing and promotion, discrete, global and scheduled orders

Make to order at scale

Full product lifecycle support

Product and service innovation informed by customer and product feedback





Sr. Solutions Architect

**Amy Vasquez**

# QAD CRM Highlights



# Corporate Structure

CRM Accounts > Corporate Structure

Corporate Structure | Default View | More

ABC Automotive  
Account Name

Irehi Assan  
Primary Contact

Phone

assan@abcauto.ge  
Email

Main | ⚙️

Main

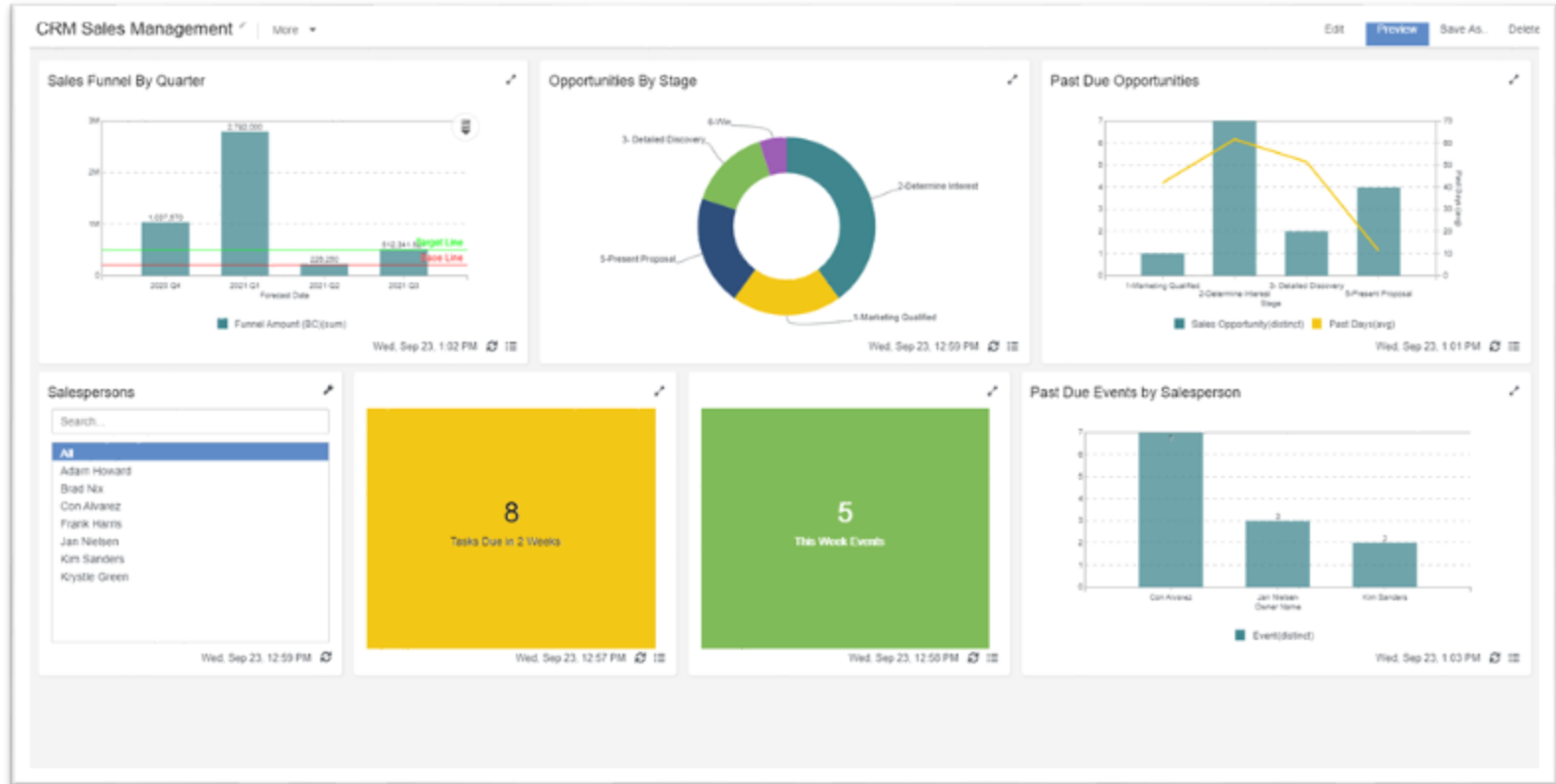
More | Open

Account Name	Account Type	External Account Mgr	Site Type	Primary Contact	Phone	Email	City	State	County
Auto-Plas International	Customer	Sales2		Harriet Farnsworth		harriet@autopasintl...	Essex		
CanCar Corporation	Customer	Sales1		Douglas Thomas	519 428-2262		Oshawa		
ABC Automotive	Customer	Sales2		Irehi Assan		assan@abcauto.ge	Ingolstadt		
CanCar Corporation	Customer	Sales1					Oshawa		

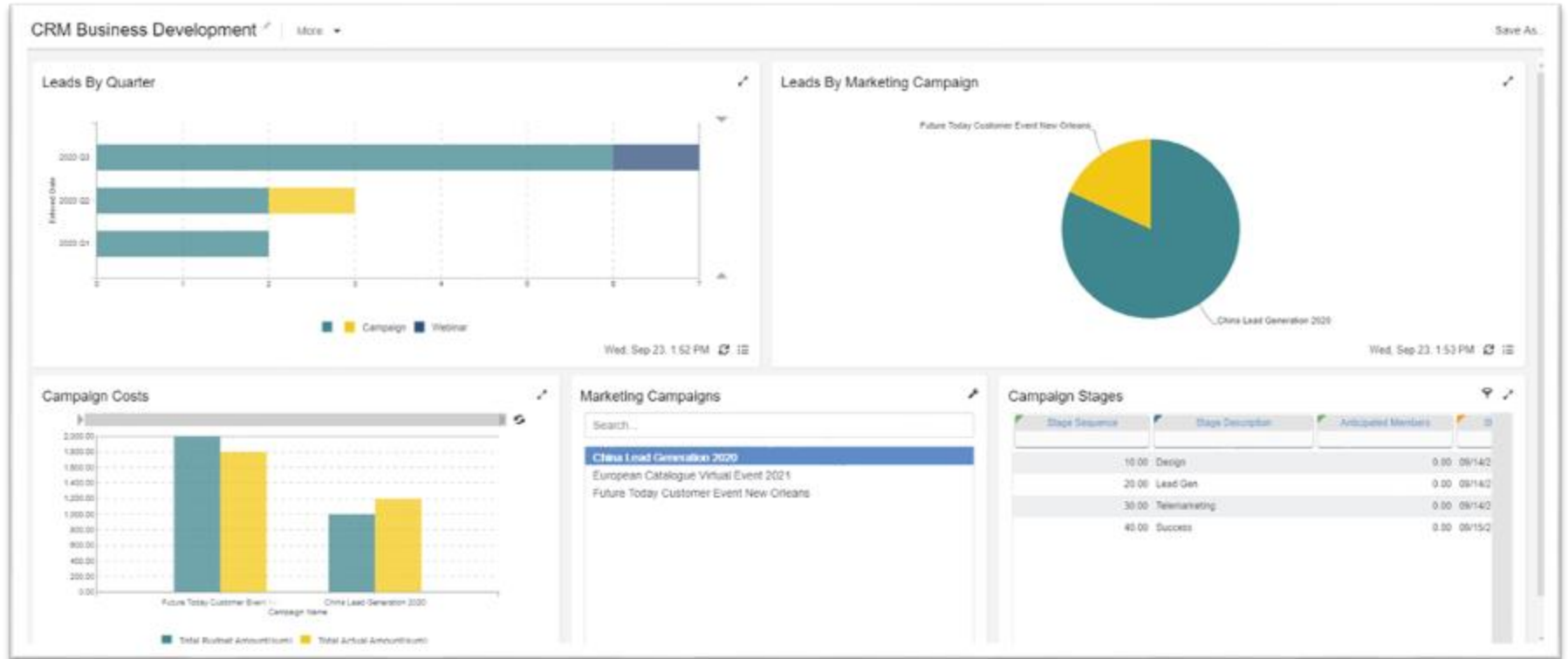
<< < > >> 50 1 - 4 of 4

Close

# Action Center – Sales Manager



# Action Center – Business Development



# Value of Enhancements

Role	Value
<b><i>Customer</i></b>	<ul style="list-style-type: none"><li>• <i>Faster response time</i></li><li>• <i>Increased satisfaction</i></li></ul>
<b><i>CTO</i></b>	<ul style="list-style-type: none"><li>• <i>Reduced risks</i></li><li>• <i>Standards-based QAD platform</i></li><li>• <i>One user experience for both ERP, CRM and mobile solutions</i></li><li>• <i>Integral system</i></li></ul>
<b><i>Sales Management</i></b>	<ul style="list-style-type: none"><li>• <i>Mobile sales team always in touch and always on top of their accounts.</i></li><li>• <i>Enables increased closure rates by allowing them to focus on the deal</i></li></ul>

# QAD CRM Demo



Sr. Solutions Architect

**Amy Vasquez**

# Summary

# Thank You For Attending

For More information contact your Account Executive, visit our website, or email [Sales@Strategic.com](mailto:Sales@Strategic.com)



[www.strategic.com](http://www.strategic.com)

# Questions?



Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022







Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022



This is an accent color gradient. Corporate colors are the uppermost theme colors in the pallet.

Variations below.









Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022







Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022









Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022







Channel Partner

[www.strategic.com](http://www.strategic.com)

Copyright 2022



# Questions?



# SIG Logos

Horizontal - png



Backgrounds are transparent, white logos are on top of a colored square

Stacked - png



# SIG Logos

Horizontal - jpg



Stacked - jpg



# QAD Channel Partner Logos



Channel Partner



Channel Partner



# QAD Industry Icons



Block Charts, if needed. Icons can be changed out, and/or re-colored....email or call Barbara for help...404-944-8842



## Direct Mail

- Follow the CFO
  - Monthly
- Intro to ERP
  - US-Jan (LS)
  - UK-Feb (LS)
  - IRE-March (FB)
- MSERV
  - Five touch drive to LP Introduction

1 lead from FTCFO  
2 from Intro to



## Email

- **Event Outreach**
  - Drive attendance and awareness
- **Webinar Promo**
  - Drive EBS Leads
  - 28 Registered



## Telemarketing

- Follow the CFO
- Intro to ERP

Increasing synergy with TLE to coordinate efforts and increase mutual visibility into both databases.



## Social

- SIG Event Promo
- Webinar Promo
- Post Event Pics