Baker Tilly Customer Experience Management (CXM)

Provides visibility to all interactions that are part of an organization by managing and tracking every business activity, opportunity, and customer relationship from the beginning untill the end. It also allows measuring satisfaction in each business interaction to generate early actions, as well as the production of meaningful reports to make solid decisions based on achieving the set goals and current sales, taking into account the established strategic and operational criteria.

For easiness while using the CXM, sales representatives and the manager can upload documents related to commercial activity (product brochure, proposal forms, commercial documents, etc.) in different formats (Word, PPT, PDF, among others). They can also schedule appointments by client, measure their commercial progress and integrate tools such as Waze, Outlook and other business systems into the process.
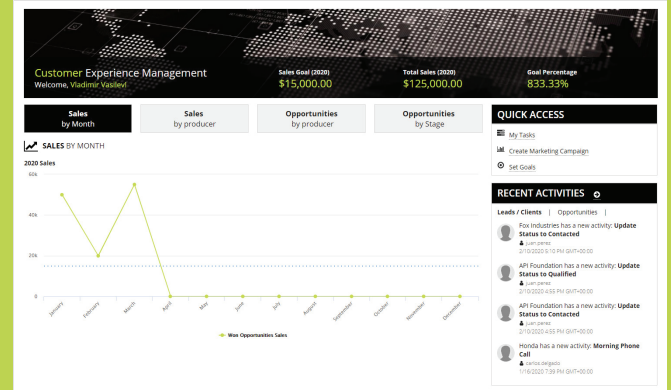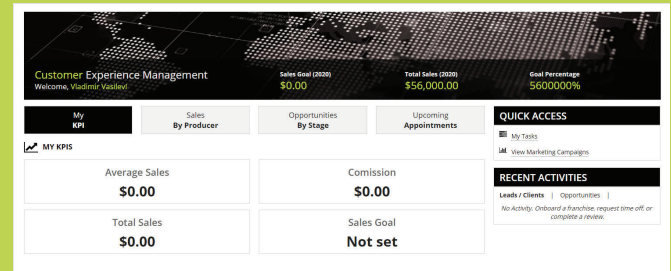
Since the initiatives, processes, actions, decision criteria, reports and graphics of an organization are those that are combined in the customization of the CXM, the degree of adaptation to business needs is really high.

Customer management: the sales team and the manager can add new leads and commercial opportunities.

Activity monitoring: every interaction with a customer or an opportunity can be registered and qualified to obtain a score for the customer relationship in general.

Commercial appointments: the sellers and the manager can schedule and follow up of their business appointments.

Marketing campaigns: the marketing team can create campaigns and customized goals based on defined filters by the user and also detonate marketing campaigns on social networks from Appian.

Sales objectives: sales manager can set goals for the year and particular objectives for each of the sellers. The manager can also monitor team performance, consolidated current sales and consolidated potential sales.

Customized view: the apps is designed for 3 types of users, each one with their site and functionalities: sales leader (managers), producers (sellers) and marketing (campaign creators).

Reports' generation: sellers have the view of their own commercial activity, updated only with their data. Managers can see their team commercial activity and their own.

Mobile: our CXM can be used from cellphones, tablets, laptops or computers, creating easiness to work from any place.

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