



MICROSOFT CRM Get a clear picture of your customers and their habits from lead generation through sales to customer retention.

Now every player in your organization can access key account information in the format they need. Field Reps are able to instantly retrieve and enter data for any contact, managers get the visibility they require with detailed reports and forecasting, and customized dashboards allow executives to utilize real time data to make effective high-level decisions.

WHY PHASE 2 ?

- **LOWEST COST**
- **NO SETUP FEES**
- **FREE SUPPORT**
- **TRAINING INCLUDED**
- **CUSTOMIZATION INCLUDED**

FROM \$39.99 USER / MO.

TRACK LEADS

The screenshot shows the Phase 2 CRM interface. On the left, there's a sidebar with navigation options like 'My Work', 'Calendar', 'Contacts', 'Reports', 'Assessments', 'Reports', 'Opportunities', 'Marketing Lists', 'Campaigns', 'Marketing Lists', and 'Campaigns'. The main area is divided into two panes. The top pane shows a list of leads with columns for 'Company Name', 'Name', 'Business Title', 'Phone', 'Email', and 'Lead Source'. The bottom pane shows a detailed view of a lead for 'AAA Truffle Factory' with fields for 'Company Information' (Market Segment, Company Name, Job Title, First Name, Last Name, Type of Business) and 'Contact Information' (Description, Business Phone, Mobile Phone, Web Site, Address).

Company Name	Name	Business Title	Phone	Email	Lead Source
E Creative Delivery	Stephan		214-292-1111	stephan@ecreative.com	Web
San Antonio Bank Credits	Peter		214-412-1111	phillip@sanantonio.com	Web - Call
A.S. Brands, Inc.	Stewart	Director	402-624-4211	stewart@asbrands.com	Web
AAA Truffle Factory	Frances LeTuit			frances@aaatruffle.com	Networking
Alexis Dark Chocolates	Dan	Branch Chief	214-212-2121	alexis@darkchocolates.com	Employee Referral
Aaron Huffels	Aaron Huffels		714-913-4111	aaron.huffels@...com	Web
Arde Brugs Architects Inc	Harold	Director	888-948-8111	harold@ardebrugs.com	Other
Anderson International Group	Heather	Director	212-380-8111	heather@andersonintl.com	Other
Anderson & Associates Inc.			714-913-4111		Other
Anderson & Associates			412-527-4111		Other
Andrew & Associates			714-446-4111		Other
Andrew & Associates			812-412-4111		Other
Andrew Group			310-380-3800		Other
Andy Park Architects & Interiors			714-438-4111		Other
Angerum Construction			630-489-4111		Other
Angel	Rob	Owner			Other
Angelo Reed			481-289-4111		Other
Angus Ltd			463-679-4111		Other
Andi Vasa Architects & Interiors			212-424-4111		Other
Amos			888-410-7111		Other
Amos Architects	Marie Edwards		830-426-1811	marie@amosarch.com	Other
Amos Architects Inc					Other
Amos & Associates			412-612-6111		Other
Amos & Associates			877-289-4111		Other
Amos & Associates			877-469-4111		Other
Amos & Associates			312-469-4111		Other
Amos Architects			212-758-4111		Other
AD Industries			201-461-4111		Other
AOC Accounting Overland			888-488-4111		Other
ACSoft	Christopher		941-894-4111		Other
AFCS			763-424-3811		Other

MANAGE ACCOUNTS

The screenshot shows the detailed view of a lead for 'AAA Truffle Factory'. The 'Company Information' section includes: Market Segment (Retail), Company Name (AAA Truffle Factory), Job Title, First Name (Frances), Last Name (LeTuit), and Type of Business (Delicacies). The 'Contact Information' section includes: Description (Looks like you can order from them for way less money.), Business Phone (800 555-0331), Mobile Phone (NA), Web Site (http://aaatruffle.com), and Address (Street 1, Street 2).

CONTACT INFORMATION

ANALYZE PROSPECTS

CUSTOMER TESTIMONIAL



"When we laid out the costs of running our own software vs. subscribing with Phase 2, the choice was clear. We signed up the same day."

John Bischof
Midwest Capital Group

INFORMATION ABOUT FEATURES

FAMILIAR OUTLOOK EXPERIENCE

PROVIDES FULL INTEGRATION TO SALES, MARKETING, AND CUSTOMER SERVICE FROM ONE CENTRALIZED ACCESS POINT FOR ALL CUSTOMER INTERACTIONS AND RELATIONSHIPS.

CENTRALIZE RELATIONSHIPS

ALLOWS YOUR ORGANIZATION TO TRACK ALL IMPORTANT ASSOCIATIONS AND LINKAGES ACROSS CUSTOMERS AND PENDING SALES OPPORTUNITIES. NAVIGATE COMPLEX ORGANIZATIONS WITHIN THE SALES FUNCTION BY ASSIGNING ROLES AND INFLUENCE TO KEY DECISION-MAKERS.

ROLE-BASED NAVIGATION

DELIVERS PERTINENT CUSTOMER INFORMATION TO THE END USER ACCORDING TO THE JOB ROLE (OR WORKPLACE PROFILE) SELECTED BY THE END USER. ADAPT THE MICROSOFT CRM WEB AND OUTLOOK INTERFACES TO DISPLAY APPROPRIATE CRM INFORMATION FOR END USERS UPON LOGGING ONTO MICROSOFT CRM.

QUICK CAMPAIGN WIZARD

SIMPLIFIES SALES PROSPECTING AND CULTIVATION BY ENABLING SALES AND MARKETING PROFESSIONALS WITH A QUICK, FIVE-STEP PROCESS FOR LAUNCHING A CAMPAIGN TO A TARGET GROUP OF CUSTOMERS.

FORM ASSISTANT

ADAPTIVE USER INTERFACE. QUERIES RELATED SYSTEM OBJECTS AND DELIVERS INFORMATION IN A SIMPLIFIED, NON-INTRUSIVE FORM TO SIMPLIFY DATA ENTRY INTO MICROSOFT CRM.

INTEGRATED KNOWLEDGE MANAGEMENT

ENABLES ORGANIZATIONS TO DOCUMENT BEST PRACTICES, STANDARD OPERATING PROCEDURES, AND DETAILED PRODUCT TROUBLESHOOTING GUIDES IN A CENTRALIZED, SEARCHABLE INDEX. SEARCHABLE INDEX FOR DETAILED OPERATIONAL PROCEDURES AND PRODUCT TROUBLESHOOTING.

PERVASIVE SECURITY SYSTEM

ENSURES THAT ALL IMPORTANT CUSTOMER AND BUSINESS INFORMATION IS PROTECTED, ACROSS USERS, TEAMS, AND BUSINESS UNITS. SECURE CUSTOMER RELATIONSHIPS WITH ROBUST AND DEPENDABLE DATA SECURITY.

ABOUT PHASE 2

Phase 2 International offers you the opportunity to take advantage of this product with no data center, no IT department, and at the lowest cost in the industry.

CONTACT US

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BROWSER REQUIREMENT: INTERNET
EXPLORER 6.0 OR LATER, 32-BIT BROWSER ONLY