



# Open Practice

Builds a Better Practice

## CLIENT RELATIONSHIP MANAGEMENT

Ensure your customers receive the service they deserve – build strong relationships with clients, referrers and other contacts.

- Event management
- Market effectively
- Secure client and contact relationships
- Control event costs
- Focus efforts
- Generate mailing lists.

The client relationship management system is fully integrated with Open Practice and provides the database structures and tools necessary to assist with the organisation and management of marketing and other events.

### What is an event?

An event may be a tax seminar, a golf day, an in-house training session or the publication and distribution of a newsletter. It is any occasion where selected contacts, clients and staff, and

the information held about them in your database, are selected from the database tables, and an activity directed towards them through a new common attribute – the event.

It may involve sending invitations and controlling acceptances, or sending a newsletter to a specific target group. There is no restriction on the number of events that may be managed, and a list may be maintained for as long as it has value. Every event requires a unique combination of resources. With the client relationship management system, you manage the people, resources and costs involved.

### Who can be included in an event?

Contacts, clients and your own staff can be included in a list. A rich combination of selection criteria can be applied in compiling your list. For example, a list may be created of the decision makers in real estate agencies in a selection of areas identified by postcodes, and it may include both clients and prospects.



Such a list can be assembled within seconds! It is even possible to base a list on the personal or professional interests of contacts.

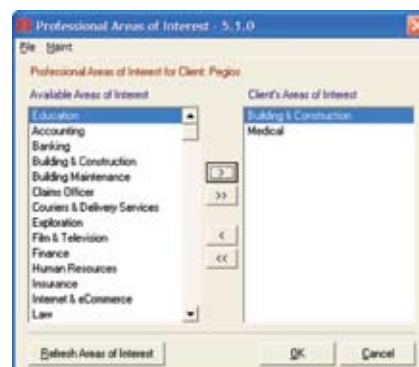
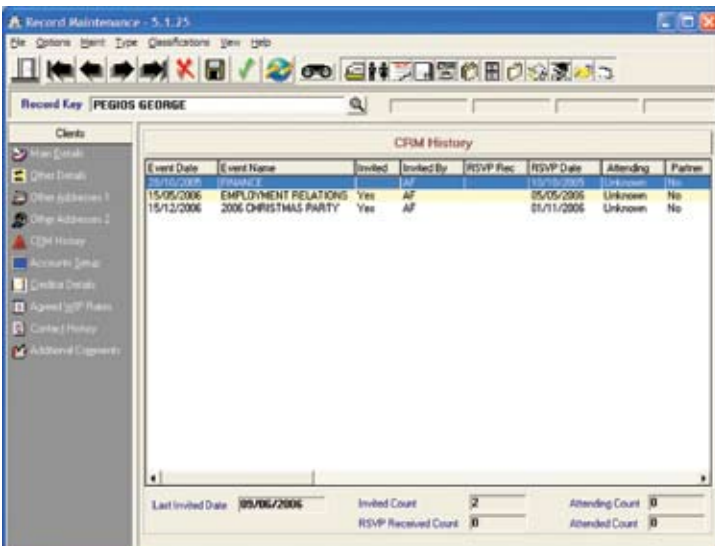
As acceptances are received they are noted and the number of details of outstanding acceptances is automatically maintained.

### What elements can be managed?

Apart from the individuals involved, many other elements associated with an event can be effectively managed including:

- Venue
- Date and time
- Internal and external resources
- Internal and external costs
- Dietary preferences
- Responsibility.

With limited resources, using the system will make sure that irritating resource usage conflicts are eliminated.



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### **Generating invitations and other documents: electronic stationery**

The invitation list data may be used to create mass mail merge invitations, letters, labels and other electronic stationery that you require.

An electronic stationery and printer set-up project will help you to identify your needs. There is no restriction on the number of different types of stationery that can be generated.

### **Extracting information: reports**

The system is delivered with some standard reports. As all information is stored in the Open Practice database, users of Crystal Reports are able to develop and generate their own customised reports.

