



EPICOR RETAIL

## Epicor Retail CRM

- Campaign and Promotion Manager
- Customer Reporting and Analytics
- Key Performance Indicators and Metrics
- Loyalty and Rewards Manager
- Customer Database
- Clienteling
- Web Services
- CRM Services

Epicor Retail CRM is a broad set of complementary tools to enable mutually beneficial relationships between a retailer and its customers. These tools are designed to drive sales, increase loyalty, and support the business processes necessary for success in today's competitive marketplace. Epicor Retail CRM provides integrated capabilities for customer analysis, customer segmentation, campaign management and loyalty points program management with real-time targeted communications to point-of-sale (POS) or other sales channels. Designed to support multiple sales channels and employ powerful analysis tools, this product provides a complete and consolidated view of the customer.

## Why Customer Relationship Management?

The combination of fierce competition coming from other retailers and an increasingly fickle and demanding consumer population make customer loyalty both difficult and imperative to achieve in today's retail environment.

System enhancements at POS and throughout the store are addressing new ways to empower your sales associates to better serve your customers. With better service during each visit, the chances increase that they will return. But to drive loyalty, retailers need to do more than just provide better customer service; they need to truly know their customers and provide personalized service based on this knowledge.

Knowing a customer means understanding what they have purchased and what they might purchase. Knowing a customer means recognizing them at the POS and being able to target a relevant promotion to them based on who they are. Knowing a customer means recognizing them in all stores and across all sales channels. With Epicor Retail CRM, start knowing your customers and they'll keep coming back.

## Epicor Retail CRM

Epicor Retail CRM key components help you provide exceptional customer service, manage your customer touch points, target the right customers and identify incremental value from your marketing programs.

### **CAMPAIGN AND PROMOTION MANAGER**

The intuitive Campaign and Promotion Manager wizard provides the ability to setup a campaign, define promotions, manage the execution of your campaigns and track results. During promotion set up, users will appreciate the module's tight integration to the query tool and the segmentation tools. This integration allows users to easily choose appropriate customer groups, while also providing the ability to specify which sales results are most meaningful when measuring individual promotion success.

To execute your campaign and promotions, CRM can interface to your POS, call center, kiosk, PDA, or e-commerce site. Whether your next campaign is direct mail, voicemail, e-mail, or text messaging, CRM will help you prepare and export the lists to send to your third party vendors for execution. As transactions flow into the customer database, campaign and promotion results are automatically updated. Analysis on your marketing initiatives can begin immediately.

#### KEY FEATURES

- Develop and support complex customer segmentation strategies
- Create targeted lists from a robust query tool
- Define and track control groups to determine lift
- Identify incremental sales to prove true ROI

### **CUSTOMER REPORTING AND ANALYTICS**

Discover the marketing opportunities in your customer data with our suite of reports and templates. Whether your organization is new to customer relationship management or a sophisticated advocate, the Epicor Retail CRM solution has the comprehensive tools to deepen your understanding of your customers' needs and preferences. The solution provides extensive customer, transaction, campaign and loyalty analysis out of the box to reduce learning curves and accelerate a retailer's ability to use data strategically. Easy access to reporting and analysis tools is coupled with the underlying power and flexibility of the database architecture.

Epicor Retail CRM allows you to segment your customer base and create lists of customers for direct marketing programs or for further analysis. An intuitive point-and-click query builder allows the marketer to filter customer attributes, purchase behavior, and recency-frequency-monetary (R-F-M) variables to generate customer lists or segments.

From the intuitive browser-based user interface, you can quickly analyze and compare customer shopping behavior across sales channels. Purchase history analysis includes a complete view of the customer, accessible from any point of interaction.

#### KEY FEATURES

- Report and analyze with easy-to-use tools designed with the marketer in mind
- Perform multichannel customer analysis
- Segmentation tools
- Manipulate report results with ease using functionality and flexibility from Microsoft Reporting Services
- Seamless integration with Microsoft Excel

### **KEY PERFORMANCE INDICATORS AND METRICS**

Epicor Retail CRM makes it easy for a marketer to display key customer performance indicators (KPIs) and metrics from the CRM database. Whether in a graph or grid view, the data is presented in an easy-to-interpret manner. The data behind these KPIs and metrics is continually updated to ensure that all management within your organization has access to the most up-to-date data.

#### KEY FEATURES

- Easy to read customer KPIs
- Easily accessed by everyone
- Display various KPIs/metrics for different audiences within your organization

## LOYALTY AND REWARDS MANAGER

The goal of any well-designed retail loyalty program is to drive ROI by changing customer behaviors. How you achieve this goal is fundamental to the program's success. You must be able to:

- Integrate all your sales channels
- Reward customers based on analysis of their purchase behaviors and profitability
- Structure your program in a way that will motivate positive changes in your customer's behavior

Epicor Retail CRM lets you design and run your loyalty program with the flexibility and security of a retail-proven loyalty tool set.

Rewards may be issued immediately at the POS in the form of a bounceback coupon or a discount on the current transaction. Loyalty rewards are accumulated across multiple channels, adding excitement and engagement to each POS transaction or customer interaction. Epicor Retail CRM allows you to analyze overall loyalty program effectiveness, including percentage of your customer base in the program, percentage of sales coming from program customers, comparison of average purchases for preferred/non-preferred customers, new signups over time and more.

### KEY FEATURES

- Manage your points-based or discount-based loyalty program with all the necessary tools
- Easily define basic and bonus point rules yourself
- Accumulate points across all channels and touch points
- Reward customers differently based on their value to your retail organization

## CUSTOMER DATABASE

Epicor Retail CRM includes a central customer database for both corporate and store-level users. A corporate employee or an associate in any store can identify any customer, look up address information, demographics, attributes and purchase history through an intuitive user interface. This complete view of the customer can be used for store-level clienteling to bring in traffic or for in-store suggestive selling. At the corporate level this information can be used for detailed customer analysis as well as for offering excellent customer service in a call center environment.

### KEY FEATURES

- Flexible retail data model
- Easy-to-use user interface
- Supports multichannel retailers

## CLIENTELING

Most customers are willing to share personal information with companies if it means receiving more personal service while shopping, however, many feel personal service has been missing from their shopping experience and would like it to return. Since a considerable amount of brand loyalty is created at the point of sale, it's important to arm your salespeople with the tools they need to best serve your customers.

In addition to enterprise-wide, multichannel purchase history available from any point of interaction, Epicor Retail CRM lets you link customer records to particular sales associates to automate their "little black book" of customers. Whether checking in on customers that have not shopped in a while or looking up the last few purchases of a customer in the store, CRM puts key information at the fingertips of your sales associates, enabling them to provide outstanding customer service.

### KEY FEATURES

- Access to detailed customer information at POS
- One-to-one messaging at point of interaction
- Custom-definable attributes
- Contact preferences by channel of communication

## WEB SERVICES

Epicor Retail CRM's Web services simplifies data access and integration to your valuable customer data. It supports flexible deployment scenarios and provides access to a wealth of highly personalized information that will add relevant content and interest to any external application such as your online store. Based on the information stored in your customer database, the entire customer relationship experience can be personalized with highly relevant up-sell and cross-sell suggestions as well as important information about how many points are required to reach the next threshold in your rewards program. CRM Web services also facilitates customer's updating their own contact information and contact preferences, reducing the need to speak directly with customer service representatives.

### KEY FEATURES

- Personalize your customer's website experience based on their individual preferences using your central customer database
- Provide access to customer information in any external applications such as kiosks or an intranet site

“Outsourcing our CRM services to Epicor has enabled us to leverage our solution in ways we could not do in-house. Using their professionals for our database and system maintenance, loyalty program management, and marketing support improves the quality of our information and ensures we apply it effectively, in creative, well-targeted campaigns that generate solid ROI.”

Sarika Rastogi  
 Director of CRM  
 Foot Locker

## CRM Services

Let the experts at Epicor manage your Epicor Retail CRM application – from database hygiene to running your marketing programs. We know retail, and know Epicor’s CRM product. With a team dedicated to providing CRM operational support across many clients, we offer efficiencies to improve operational security and drive down the cost of service. With various options tailored to your specific needs, you can choose from services such as, database maintenance, marketing support, strategic consulting and ad hoc consulting.

### MAINTENANCE SERVICES

- Clean customer lists and consolidate data duplication
- Correct errors in customer and contact information
- Standardize addresses and resolve errors on all customer imports
- Monitor and verify all data imports process consistently and successfully
- Manage quarterly National Change of Address (NCOA) process
- Segment data according to retailer specific criteria and preferred target groups

### MARKETING SUPPORT SERVICES

- Set up promotions
- Manage control groups
- Track and analyze response
- Calculate campaign lift and ROI
- Coordinate with third party direct marketing vendors such as mail house or e-mail provider

### STRATEGIC CONSULTING

- Assist in the design of loyalty programs
- Assist in loyalty program implementation and training
- Analyze existing loyalty programs and make recommendations for improvement
- Manage all aspects of your loyalty program if looking for an “outsourced” model
- Develop long-term customer segmentation strategies

### AD HOC SERVICES

- Database cleanup when regular maintenance has not been performed
- Parameter review for new users on an existing implementation
- Help cover workload for employees who leave your company
- Advanced CRM training

Epicor also provides a variety of forums to keep you fully informed and involved in our product direction, including client advisory boards, focus groups, client conferences, online seminars, and publications.



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