

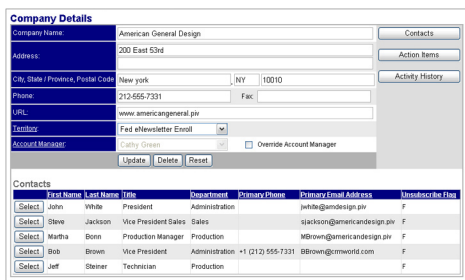
Contact Management Application

Improve lead follow-up and increase your return on investment by performing basic contact management within CDC MarketFirst

The CDC MarketFirst Contact Management Application provides core contact management capabilities in an easy-to-use application that works seamlessly with your CDC MarketFirst marketing automation.

- **Extend the value** of your marketing automation investment by eliminating the need to purchase a standalone CRM or contact management system
- **Streamline and simplify contact management** by performing its functions within CDC MarketFirst
- **Free up administrative time and reduce costs** by reducing the number of disparate systems IT has to support
- **Eliminate integration hassles** by selecting a pre-integrated CDC MarketFirst application
- **Increase productivity** by empowering users across pre-sales, telesales, and telemarketing to perform personal follow-up to CDC MarketFirst communications
- **Improve lead nurturing and follow-up** by making it easier to assign automated or live follow-ups to communications and campaign responses

To learn more about the CDC MarketFirst Contact Management Application and how it can address your firm's unique needs, call +1 877-748-6825.



The screenshot shows a web application interface for managing company and contact information. The top section is titled "Company Details" and contains a form for "American General Design" with fields for address, phone, and URL. Below this is a "Contacts" table with columns for First Name, Last Name, Title, Department, Primary Phone, Primary Email Address, and a checkbox for "Subscribe This".

Select	First Name	Last Name	Title	Department	Primary Phone	Primary Email Address	Subscribe This
<input type="checkbox"/>	John	White	President	Administration		jwhite@americandesign.piv	F
<input type="checkbox"/>	Steve	Jackson	Vice President Sales	Sales		sjackson@americandesign.piv	F
<input type="checkbox"/>	Martha	Benn	Production Manager	Production		MBenn@americandesign.piv	F
<input type="checkbox"/>	Bob	Brown	Vice President	Administration	+1 (212) 955-7331	BBrown@cmworld.com	F
<input type="checkbox"/>	Jeff	Steiner	Technician	Production			F

Easily view company details and contacts

Harness the power of CDC MarketFirst to streamline and simplify contact management. The Contact Management Application for CDC MarketFirst makes it easy to manage contact information, assign contacts to call queues, assign actions for follow-up, and more.

The CDC MarketFirst Contact Management Application is designed to help companies that do not have a contact management or CRM solution extend the value and utility of their CDC MarketFirst system—or for those who have an existing standalone solution but want to avoid the costs and complexities of integration. Suitable for companies seeking either light contact management features or a starting point for building out a custom contact management system, the Contact Management Application enables users across marketing, pre-sales, telesales, and telemarketing to perform basic contact management activities in a pre-integrated solution with an easy-to-use web interface.

Manage Contact and Company Information

Access, input, and edit contact information using a web form, keeping all contacts up to date as users learn new information. Manage company information as well, easily viewing or editing lists of contacts at each firm.

Create Call Queues for Sales or Pre-Sales Follow-Up

Associate "territories" with sales or pre-sales reps or service agents by assigning call-group criteria for them, which can be based on global lists, profiles, database segments, and more. Assign all campaign respondents in a certain geographic area or with a specific product interest—or even of a certain demographic group—to the best person for follow-up, creating a personalized call queue. When users log in, they can click on "My Call Queues" to instantly access a sortable list of contacts with whom to follow up. By clicking on the contact, the user can drill down to see more information about the contact, including a history of past actions associated with the contact, ensuring they can approach each contact in a personalized, informed manner. Pre-sales reps can use this feature to help qualify and verify contact information. When used in conjunction with the CDC MarketFirst Contract Renewals Application, this feature can also be used to help service agents or administrators track and follow up on expiring service and support contracts.

Assign Actions to Ensure Consistent Follow-Up

Improve organization and group collaboration by assigning call follow-up actions to yourself or other team members. When users log in, they can click on "My Action Items" to see all assigned tasks and drill down to easily find deeper contact information and histories.

Administer User Privileges

Assign usernames and passwords, and set individual user privileges, such as the ability to manage territories and companies or administer other users.

Reduce IT Costs and Resource Demands

Using CDC MarketFirst for contact management eliminates the need to purchase expensive standalone customer relationship management (CRM) or contact management applications for companies with light contact management needs by performing basic contact management functions right within CDC MarketFirst. Extend the value of your investment in CDC MarketFirst and reduce the number of systems your IT team has to support. Eliminate the costly and time-consuming process of integrating your marketing automation solution with a CRM or contact management system by choosing this pre-integrated solution. Alternatively, the CDC MarketFirst Contact Management Application can be used as an interim contact management system for companies that plan to move to a full CRM system at a later date, providing a "stepping stone" that helps build up a reliable, centralized database.

CDC MarketFirst Contact Management Application: Features

Features	Description
User Management	Manage individual user privileges related to contacts, activities, call groups, and user administration.
Call Group Management	Assign users to CDC MarketFirst Call Groups and determine criteria for group membership. Groups can be based on individual campaigns, profile elements, static lists, database segments, and more. Any time a MarketFirst contact meets the criteria for your contact group, they will automatically be assigned to the group.
Contact Management	Input and edit basic contact information, assign your contact's primary Call Group and Account Manager, manage addresses, assign Action Items to yourself or other users related to your contact, or view the MarketFirst activity history.
Company Management	Manage and act upon details related to the organization at which a contact works. This module also enables you to view all available contacts within an organization.
Call Queues	View, sort, and search contacts within your Call Groups for the purpose of personal follow-up or nurturing campaigns.
Action Items	Assign calls, appointments, tasks, and notes to yourself or other users.
Action History	View past interactions with a contact in a comprehensive contact history.

Contact Details

Contact Name:	Bob	Brown	Addresses
Title:	Vice President	Department: Administration	Action Items
Primary Email:	BBrown@crmworld.com	Secondary Email:	Activity History
Company:	American General Design		
Territory:	Fed eNewsletter Enroll		
Account Manager:	Cathy Green	<input type="checkbox"/> Override Account Manager	
Update		Reset	

Addresses

	Type	Address Line 1	Address Line 2	City	State / Province	Postal Code	Country	Phone	Fax	Primary
Edit	Make Primary	Work 200 East 53rd		New York	NY	10010	US	+1 (212) 555-7331	+1 (212) 555-7790	<input type="checkbox"/>

Drill down into contact records for details

Learn More About CDC MarketFirst

To learn more about how CDC MarketFirst can help your organization take advantage of the full potential and costs savings of electronic channels, maximize conversions, and expand market reach, call us today at +1 877-748-6825 or visit us at <http://www.marketfirst.com>.