



Alerts & Email Response: It's Not What You Think

Have you ever been asked whether you'd like "Alerts" or "Email Response" to be part of your CRM implementation? If you have, chances are that your answer was "Sure would!". But – if someone asked WHAT these functions would do for your CRM system, and HOW they could benefit your organization, you might not respond so quickly.

So let's begin by discussing Alerts.

Being kept informed is a good thing. But when someone says "alerts", we often focus on "tap-on-the-shoulder alerts", reminders such as "hey – this activity is overdue", or "this opportunity was just closed". If we broaden the definition of "alerts" to mean "any information that improves productivity, business awareness, or customer loyalty", the potential uses – and corresponding benefits – increase dramatically.

For example, with a technology like Sage KnowledgeSync, you could use an Alert to "identify a prospect not contacted within the last 7 days", or "notify a sales rep when a client changes their buying habits". You could have Alerts that tell a manager when "a sales rep changes the forecast close date of a pending sale", or that "identify a new opportunity in SalesLogix for a client who is on credit hold within your Financial application."

Now there's some real value. Even so, an alert's value is not just based on detection. The content of an alert, and the delivery of that content to the right person and right device are also critical. For example, most people assume that "alerts" means "email" – but is email always the best option? And even if it is, which email system is best -- Microsoft Outlook, SMTP, or even Lotus Notes?

Detection, content, and delivery. Welcome to the "golden triangle" of alerting. Technologies like Sage KnowledgeSync begin with Detection, whether looking for a trend, a change, or simply an exception to a business rule. It continues with Content, whether it's one-line reminders, standard forms or documents, or even analytical reports. And it ends with Delivery – no longer limited to Email – fax, pager, PDA, screen pop, and web browser are all viable delivery devices.

OK; now let's tackle "Email Response".

Exactly what is Email Response? Many people assume that it's the ability to auto-reply to incoming email messages. But heck – just about every email system out there already does this, so where's the value here?

Again – we must expand our definition of Email Response. Email Response can take an incoming email message, determine who it's from, and forward it on to the appropriate account manager. Email Response can deliver information, documents, and reports to people who request such items from a web form. And Email Response is an integration bridge, allowing data from an incoming email message to be added to records within an application database.

Like alerting, Email Response has a golden triangle of best practices. First, there's Detection. An Email Response System (or ERS, as it is called in Sage KnowledgeSync) intelligently interrogates incoming email. And not just the sender's address, either – the subject, the body, attachments – all contain valuable information. Second, there's Matching; unlike native email functionality, Email Response matches incoming messages against contacts in a database, such as in SalesLogix.

Thirdly, Email Response executes Actions. Email messages from clients, prospects, or partners are actionable items – someone needs to do something in response to them. And an Email Response system takes action in response to received messages.

Detection, Matching, and Action. Consider this: if your company has "generic" email addresses -- info@your_company.com, sales@your_company.com, or support@your_company.com, an Email Response technology will monitor messages sent to these accounts, match them to SalesLogix contact records, trigger alerts to the account managers, update a contact's history with the email details, and schedule a follow-up activity in SalesLogix. Now that's a real business benefit.

The bottom line on both Alerts and Email Response is not to let yourself be limited by a pre-conceived notion of what these functions represent. The "simple stuff" – like reminders and auto-routing -- is nice, but the real value behind Alerts and Email Response (such as in Sage KnowledgeSync) is their ability to automate processes previously done manually, improve client communication, and provide timely insight into business activities not previously visible to your organization.