

KnowledgeSync 2000: 101 Business Uses



THE INTEGRATORS

KnowledgeSync 2000 is the "smoke detector" for an organisation – it monitors business data for critical, time-sensitive events that (if un-responded to) could cost an organisation thousands of dollars in lost revenue, thousands of hours in lost productivity, and the loss of satisfied customers.

KnowledgeSync gives an organisation the ability to monitor, identify, and respond to critical corporate data to minimise the risks to a business while maximising the opportunities for revenue and customer loyalty. Among the ways that KnowledgeSync helps an organisation achieve this are:

- 1) Identify stock that will be written off if not sold promptly – and alert staff, partners, and clients to a special discount or incentive if this stock is purchased within 'x' amount of time.
- 2) Identify human errors (like pricing errors or mis-matched product components) and alert the appropriate personnel.
- 3) Notify your finance department about discounts gained through early payments
- 4) Identify project component delays, calculating whether the end completion date will be affected, and alert the customer as to whether their deadline will be affected.
- 5) Alert customers to products that will arrive before the estimated delivery date, or projects that will be completed before the estimated completion date.
- 6) Provide repeat customers with automated sales incentives
- 7) Identify a surplus in stock and notify resellers that you are initiating a special discount, incentive or rewards program.
- 8) Automatically e-Mail reorders to suppliers or send alerts about items that are within 'x' units (or 'x' percent) of their re-order level.
- 9) Fraud checking: monitor for abnormal prices or quantities and alert finance and/or legal departments.
- 10) Compare product forecasts with actual orders to anticipate shortfalls or excesses.
- 11) Identify product cost increases, monitor for excessive increases, and match these products to pending orders (and notify the clients)
- 12) Check for variations in shipping costs or excessive freight costs
- 13) Monitor for changes to clients' "standing orders" (particularly reductions to such orders) and alert the sales and finance departments
- 14) Check for sales quotation date expirations 'x' number of days in advance; send reminders to sales staff and to corresponding clients
- 15) Check for limited-time price offer expirations; correlate to standing orders and send alerts
- 16) Identify overdue sales orders
- 17) Monitor for overdue purchases/deliveries from suppliers; send alerts about both single incidents and about trends identified for specific suppliers
- 18) Send alerts about excessive discretionary discounts applied to specific product lines or applied by specific sales personnel
- 19) Monitor for sales rep commissions above / below pre-determined thresholds

- 20) Monitor for employee expenses above / below certain thresholds
- 21) Monitor supplier performance trends, such as short shipments and damaged / defective items
- 22) Identify and alert customers to their standing in regards to loyalty bonuses such as frequent buyer programs, and approaching rewards-level thresholds
- 23) Monitor stock shortages & overages between locations – to move stock around to meet regional demand
- 24) Check for pending orders placed for customers on credit hold and alert sales, finance, & the client.
- 25) Notify your HR department about employees who have recorded an abnormally high (or low) number of sick days
- 26) Identify project resource needs (such as a project engineer) and sending out an alert to all eligible engineers to see who is available for project work.
- 27) Monitor customers, employees, or business partners for “personal” milestones such as a birthday or anniversary and alerting management to present some kind of acknowledgement (or gift)
- 28) Keep customers informed about the status of backorders and/or partial deliveries
- 29) Send customers periodic updates on their account balances
- 30) Remind employees, partners, and customers about upcoming travel plans
- 31) Notify prospects and customers about your organisation's presence at upcoming trade shows, conferences, and seminars
- 32) Alert customers to subscriptions that are due to expire or are coming up for renewal
- 33) Monitor meeting room availability, changes in location or time, and / or the limited availability of tickets to special events
- 34) Track scheduled maintenance events and remind clients of upcoming service offerings
- 35) Automatically send surveys to clients for whom services such as a support call or repair has been performed.
- 36) Automatically scan the results of surveys returned via e-Mail for levels of satisfaction that fall below your organisation's pre-set thresholds and send alerts to the corresponding employees for immediate follow-up action.
- 37) Monitor the change in ratios regarding a product's price margin; if the margin falls below 'x', send an alert.
- 38) Track the number and type of lost opportunities. Match lost opportunities to specific products, salespeople, regions, industries, and competitors. Set thresholds for each criterion and receive alerts when thresholds are surpassed.
- 39) Identify sales fluctuations (or lack of fluctuations) resulting from marketing and/or promotional activity and send alerts about promotions that perform exceptionally well or poorly.
- 40) Identify location irregularities; everything from store performance to shop floor “hot” and “cold” spots.
- 41) Automatically calculate and send alerts about stock that is aged over 'x', 'y', and 'z' days and trigger dependent alerts that announce special price offers based on stock aging.
- 42) Identify and send notifications about abnormal increases in cost of goods purchased or sold.
- 43) Identify and send advance reminders about customers who are scheduled for a follow-up call or visit within 'x' number of days

- 44) Automatically identify and send alerts about customer complaints received via e-Mail or via phone; if complaints are stored within a database, track the number of complaints per product line, region, store, or salesperson. Establish maximum acceptable thresholds and trigger alerts if exceeded.
- 45) Monitor sales performance; minimum or maximum totals per pipeline status, region, industry, product line, salesperson, sales team, et cetera. Also monitor for minimum or maximum average price per product line.
- 46) Identify stock reconciliation's that do not match and alert warehouse & financial staff; and automatically update sales and inventory applications with true stock totals.
- 47) Calculate average stock utilisation per day, week, or month and compare against standing and forecast orders. If stock availability falls below minimum re-order time, send alert to re-order.
- 48) Automatically e-Mail, fax, or web post re-order requests for items low in stock.
- 49) Automatically e-Mail or fax e-commerce order placements and order confirmations.
- 50) Send alerts to sales and service staff regarding items that are sold without standard (or extended) service plans.
- 51) Track defects within products and automatically notify product development. When issue is corrected, automatically notify all customers who reported finding this defect.
- 52) Monitor employees who have logged excessive overtime.
- 53) Monitor part-time employees who have logged excessive hours.
- 54) Track current open projects and send notifications to contractors and part-time staff regarding project openings for staffing.
- 55) Track employee insurance costs and claims to suggest changes to coverage and to identify potential frauds.
- 56) Identify upcoming employee reviews; automatically distribute pre-review documents that need to be completed by both the employee and the reviewer.
- 57) Monitor for current (or projected) departmental budgetary overages or surpluses.
- 58) Identify and remind remote sales reps who don't synchronise their database on a periodic basis and thus don't keep up-to-date on critical customer activity.
- 59) Check for the presence of a "survey 'yes' flag" in each completed customer service call. If the flag is found, a call satisfaction survey is automatically e-mailed to the customer.
- 60) Monitor the "update date" of all the marketing literature that is available to resellers. If the update date equals the current date, alert the partners via e-Mail and attach the appropriate literature to the mail message.
- 61) Once an order record is flagged as "confirmed" in a sales system, automatically fax the order invoice to the customer.
- 62) Crosscheck each sales rep's upcoming schedule of client visits with the list of outstanding issues in the support queue. If a match is found, the corresponding sales rep is notified via e-Mail and their pager.
- 63) Sends out an e-Mail to distributors 'x', 'y', and 'z' days prior to the expiration of a promotional offer.
- 64) Once a promotion's expiration date passes, automatically calculate each distributor's savings (based on orders placed during the promotional period) and e-Mail them the "good news."
- 65) Monitor a manufacturer's "products" file for any new items that have a status of "ready for release" and e-Mail the release announcement to each outlet. Additionally, place an event on a Web page that includes a direct link to the new product's brochure.

- 66) Check the name of the person who makes a "diary" (or "notes") entry for a customer. If the name of the person making the entry does not match the name of the person assigned ownership of the client account, send the owner an e-Mail message with the full details of the "substitute" rep's conversation.
- 67) Alert both clients and account managers multiple times prior to the actual expiration of a support contract if it has not been renewed. Additionally, once the expiration date arrives, send out one last e-Mail to the client informing them that their contract has expired and whom to call to get in reinstated.
- 68) Distribute meeting agenda details via e-Mail and fax 'x' hours prior to the start of the meeting.
- 69) Monitor scheduled technician visits with an organisation's parts inventory and shipping schedule and pages the technician if the required part will not be available. Additionally, if the first condition occurs, automatically scan the part record for alternate supplier listings and e-Mail the alternate supplier(s) a message inquiring into the availability of the specified part.
- 70) Calculate the number of activities that each sales rep has scheduled for the upcoming week. If the number is above or below an acceptable threshold, notify the sales rep and their manager.
- 71) Monitor newly entered records for absent data – such as a lead that has been in the system for more than 2 weeks and still has no e-Mail address. If the data is missing, alert the account manager.
- 72) Monitor customer data records for critical elements of company data (such as number of employees) that are missing. If missing, use the primary contact's e-Mail address to mail them and ask for the missing data.
- 73) Check incoming e-Mail for support-related questions, notify the corresponding client's account manager about the support question, and auto-respond to the client informing them that their problem has been received.
- 74) Take the contents of a sales inquiry e-Mail message and auto-update the client's database record with the text of that message and automatically schedule a follow-up call for that client.
- 75) Automate the processing of clients' requests to "subscribe" and "unsubscribe" to e-Mail marketing campaigns.
- 76) Identify leads assigned to business partners and use e-Mail to automatically distribute them and to send periodic reminders to the partners to check on the lead status.
- 77) Use webforms to allow partners to automatically update the status of leads they have received from your organisation.
- 78) Allow clients to use e-Mail to automatically request a report of their open support calls or current account status.
- 79) Enable remote and on-the-road employees to use e-Mail and fax to request and receive sales forecast reports, inventory status reports, et cetera.
- 80) Check for a client placed on credit hold in a financial application and update the client's record in a CRM application.
- 81) Check for a closed sale in a CRM application and create the corresponding order record(s) in a financial application.
- 82) Check to see if a CRM application's "sync server" is running, and (if not), re-start it.
- 83) Check to see if SQLServer is running.
- 84) Check to see if an application's database server is running low on free disk space.
- 85) Check to see if a transaction file has (or has not) arrived for processing.

- 86) Monitor for new prospects added to a database and automatically create a comma-separated file containing those new prospects and send that file to a mailing house.
- 87) Check for clients' credit cards that are expired, or are about to expire
- 88) Check for forecasted sales opportunities that are due to close within 'x' days but whose sales rep has not yet completed steps 'a', 'b', and 'c'.
- 89) Monitor a shipping department for shipments or fulfillments that were due to be sent out but were delayed.
- 90) Check for clients who have not ordered within the last 'x' days
- 91) Check for "high maintenance" clients – those that have purchased less than 'x' dollars of product from you but have called into support more than 'y' times
- 92) Monitor for clients whose average days to pay exceeds 'x'.
- 93) Automatically distribute updated product literature, price lists, etc to clients and/or business partners.
- 94) Notify sales reps when a new competitor (or competitive info) is added to the database.
- 95) Alert management when more than 'x' proposals are won (or lost) against a specific competitor.
- 96) Automatically send post-sale follow-up messages 'x', 'y', and 'z' days after the sale to check up on the customer's status and satisfaction.
- 97) Notify a business partner when that client's application begins to record errors or is otherwise being used in an incorrect manner.
- 98) Alert a support supervisor when the average length of certain types of support calls exceeds 'x' minutes.
- 99) Notify management about changes made to a forecasted sale, such as the forecast amount, close date, or probability.
- 100) Alert the finance department about any clients whose aged receivables goes over 'x' dollars in the "over 30," "over 60," "over 90," or "over 120" day categories.
- 101) Alert management if more than 'x' support-related e-Mail messages are received from a specific client.

Call us today to find out how KnowledgeSync can be used to detect issues in your business that early warning may save you many thousands of dollars. KnowledgeSync will work over one or more ODBC accessible databases to keep you informed of just what you need to know about vital components of your business.



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