

Copenhagen Stock Exchange has a limited customer group when measuring the number of companies. Though, at the same time several thousands customers when measuring the number of contact persons. Each contact is in a number of different cases attached to several different companies, committees and organisations – and must be attended by different departments in Copenhagen Stock Exchange at the same time.

Dialog Manager is the CRM tool that Copenhagen Stock Exchange has chosen to maintain the complete overview of customers.

Anne Vintergaard, COPENHAGEN STOCK EXCHANGE

IT MAKES OUR JOB CONSIDERABLY EASIER THAT ALL CONTACT DATA ARE GATHERED IN ONE PLACE

What kinds of advantages have you experienced after you have started using Dialog Manager?

All our contact data are now gathered in one place in a very clear and manageable way. It has provided the users with a solid customer overview making it possible for them to optimize customer service. At the same time we have greatly benefited from the so-called **work-flows** – which are checklists that show in which order assignments are to be completed as well as which other assignments they depend upon. It takes the pressure off our sales- and service people and furthermore means that we can increase the quality of our daily work.

Can you give us more examples on how the users can work more efficiently?

Due to the highly advanced search functionality in Dialog Manager the users can create reports on just about anything. An example could be a list of all the customers who have purchased a specific product and who are stock members at the same time. Or a list of all the contacts that are to receive a certain newsletter.

Why did you choose Dialog Manager?

More than anything we wanted a system that we could easily and efficiently adapt ourselves. **Dialog Manager** is constructed in a very logical and user friendly way, and the Design Manager module makes it easy for us to add new fields and continuously develop the system. Besides this Dialog Manager completely resembles the well-known Windows applications. And this is a great advantage in a company like ours that has not previously worked with CRM systems.

Dialog Manager is fully integrated with Outlook. What does that mean for you?

Together with flexibility and user friendliness it was one of the most **important requirements** when we were to choose a CRM system. Almost all our **correspondence** is carried out via e-mail, which is the reason why we really appreciate the fact that integration with Outlook works so seamlessly.

How many employees use Manager?

More than half of all our employees. We are talking about all employees working with sale or with other kinds of external contact. Today there are actually more Dialog Manager users than expected when we purchased the system. And the employees use the system every day.

Can you characterise the CRM project as a success for Copenhagen Stock Exchange?

Yes, definitely. The users are very satisfied and furthermore committed to develop the use of Dialog Manager. It is a really good and flexible system, which we find ourselves very familiar with.

It sounds as if the Dialog Manager investment has been really worthwhile for Copenhagen Stock Exchange?

Absolutely. The positive expectations we had when we decided to choose Dialog Manager have been fully met. We now have a powerful CRM tool, and the payback time has progressed according to plan.



All e-mails and appointments in Outlook are saved automatically in Dialog Manager, which makes it possible for colleagues to monitor the customer dialogue.

Outlook Integration Manager

Dialog Manager provides the opportunity to create new fields for information in a matter of minutes.

Design Manager

Dialog Manager ensures the shortest possible payback time, as the system is adapted to the company's individual needs.

Payback-time

Checklists can be designed and exported from Dialog Manager as often as required.

Workflows

Correspondence