

SISTEMAS DE INFORMACIÓN

The background features a vibrant, abstract composition of splatters and dots. On the left, there are bright cyan and lime green splatters. These transition into a dense, multi-colored cluster of dots and splatters in shades of blue, purple, and magenta on the right side. The overall effect is dynamic and energetic.

2024

ANTES DE COMENZAR



Lectura
Tema 3

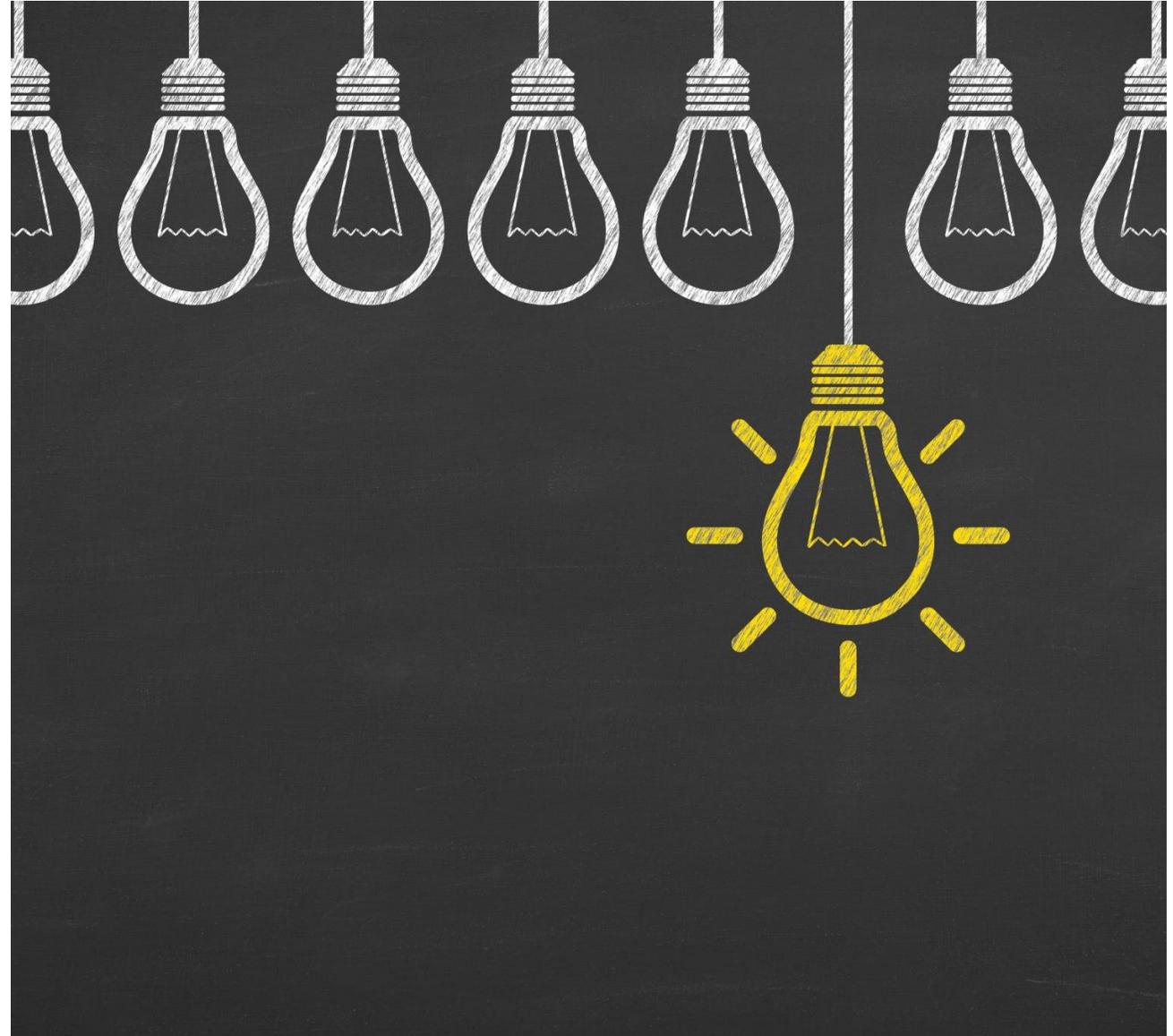


Test Lectura
Tema 3 23/5/24



Intro TP4

TEMA 3:
SISTEMAS
INTEGRADOS
DE GESTIÓN



A 3D digital illustration featuring a grid of light purple square tiles. Each tile contains a yellow Wi-Fi signal icon. The tiles are arranged in a staggered pattern. A network of thin white lines with small colored nodes (yellow, green, blue) connects the tiles, creating a mesh-like structure. In the center-right, one tile is highlighted in a vibrant cyan color, with its Wi-Fi icon rendered in white. The overall scene is brightly lit, casting soft shadows on the light gray background.

APLICACIONES COMERCIALES
COMPLEMENTARIAS AL ERP

EVOLUCIÓN



APLICACIONES COMPLEMENTARIAS

CRM

SCM

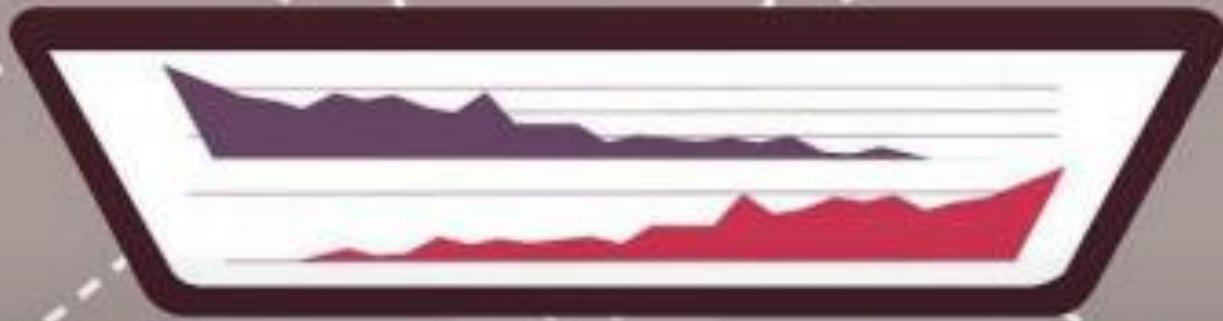
BI

KWS



CRM

SISTEMA CRM



CRM



- CRM (Customer Relationship Management) significa Gestión de la Relación con el Cliente, y es la conjunción de una estrategia y procesos acerca de los clientes, apoyada por la TI, con el propósito de incrementar la lealtad de aquéllos y, mejorar la rentabilidad de la empresa.

QUÉ ES UN CRM?

Customer



B2B
B2C

Relationship



VENTAS – MARKETING
SERVICIO POS VENTA

Management



GESTIÓN DEL CLIENTE

CRM

A blurred photograph of a modern office interior. In the foreground, a person is seated at a table, their back to the camera. In the background, several other people are seated at tables, engaged in conversation or work. The scene is brightly lit, with large windows or glass partitions visible, creating a sense of a busy, collaborative work environment.

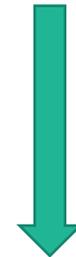
- CRM representa una estrategia coordinada de marketing, ventas y servicios.
- A través de CRM, las empresas se están transformando en organizaciones orientadas al cliente.

RESULTADO ESPERADO

Relación de larga duración con la marca
Lealtad - Retención



Conocimiento de mi cliente:
· Qué quiere
· Cómo lo quiere
· Cómo responde



Oferta de mejores servicios
Identificación de nuevas oportunidades de venta



A través de la tecnología
Personalización +
Automatización

A top-down photograph of a white computer keyboard with a black stethoscope resting on it. The stethoscope's chest piece is positioned over the keyboard's keys, and its earpieces are visible below. The background is a plain, light-colored surface.

CRM

- CRM es una herramienta que permitan tener una visión integrada del **cliente**,

CARACTERÍSTICA DE LOS CLIENTES

Cuesta más conseguir un nuevo cliente que mantener el actual.

Es más caro recuperar un cliente que se ha ido, que haberlo dejado satisfecho.

Es más fácil venderle un nuevo producto a un cliente actual que hacerlo a un nuevo cliente.

Un cliente insatisfecho divulga entre mucha gente su mala experiencia.



Un cliente que se queja, vuelve a comprar si le resuelven su problema satisfactoriamente.



No todos los clientes son iguales, algunos son más rentables que otros, algunos no son rentables pero podrían serlo,



La rentabilidad de un cliente se mide a través de lo que compra, la forma en que lo paga, de los costos que genera la entrega y los servicios adicionales que utiliza.



Una persona es cliente hasta que el competidor lo atrae con una mejor oferta.

CARACTERÍSTICA DE LOS CLIENTES

CRM - CARACTERÍSTICAS



UNIFICAR LA
INFORMACIÓN DEL
CLIENTE



INTEGRAR LAS
FUENTES DE CONTACTO
CON EL CLIENTE



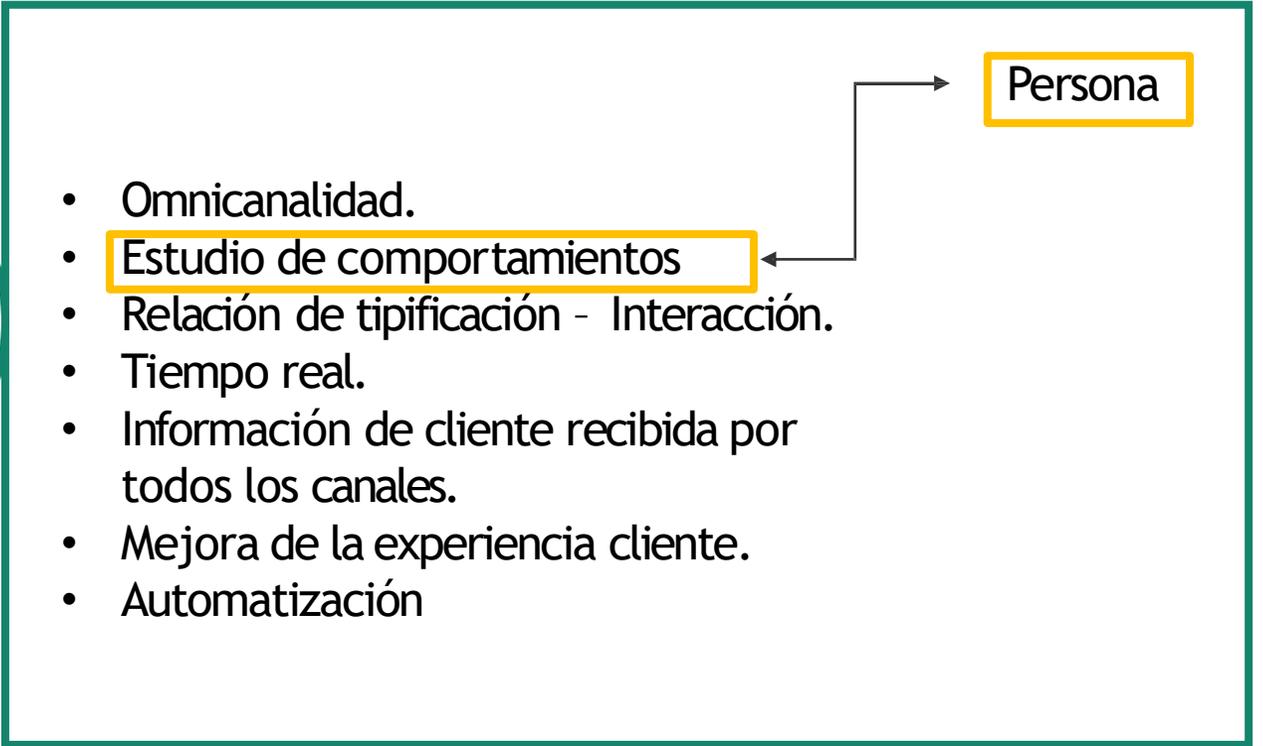
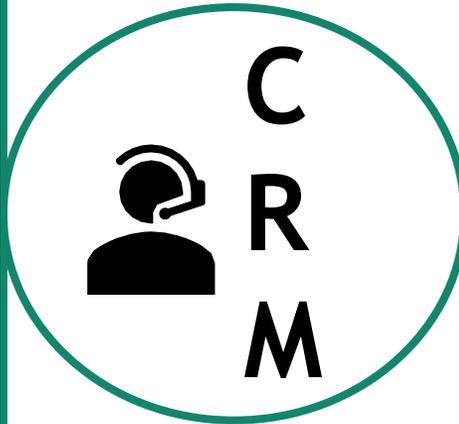
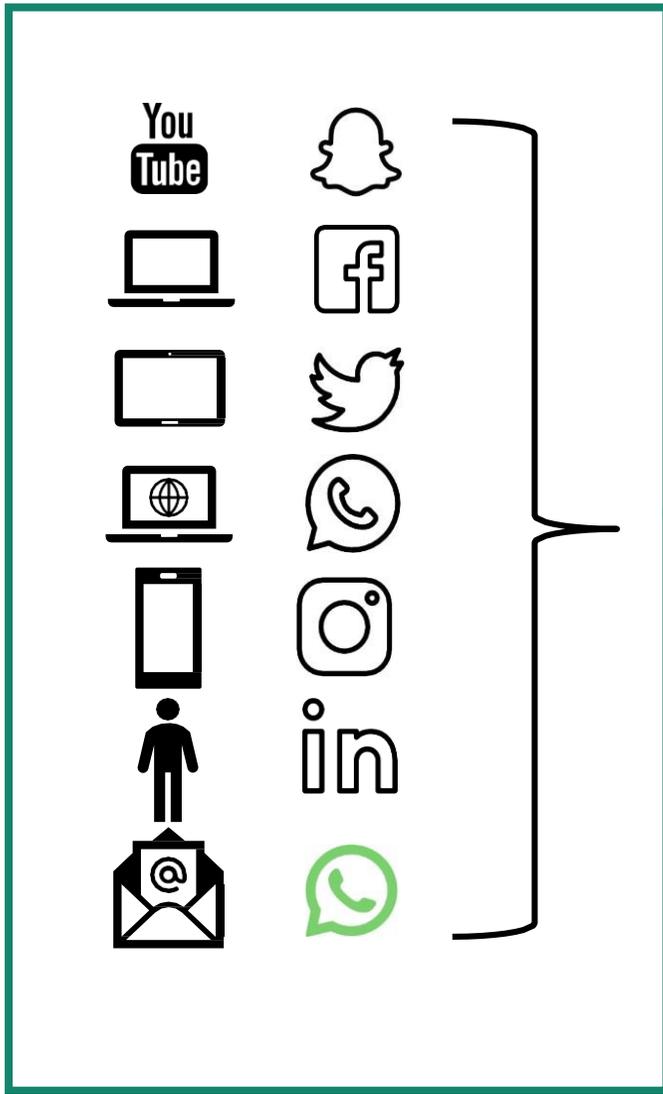
ENCADENAR LOS
PROCESOS



IMPLEMENTAR LA
EMPRESA EXTENDIDA



INTEGRAR LOS
SISTEMAS



PROPÓSITO DEL CRM

Enfoque
integrado.

Conocer el
comportamiento
del cliente.

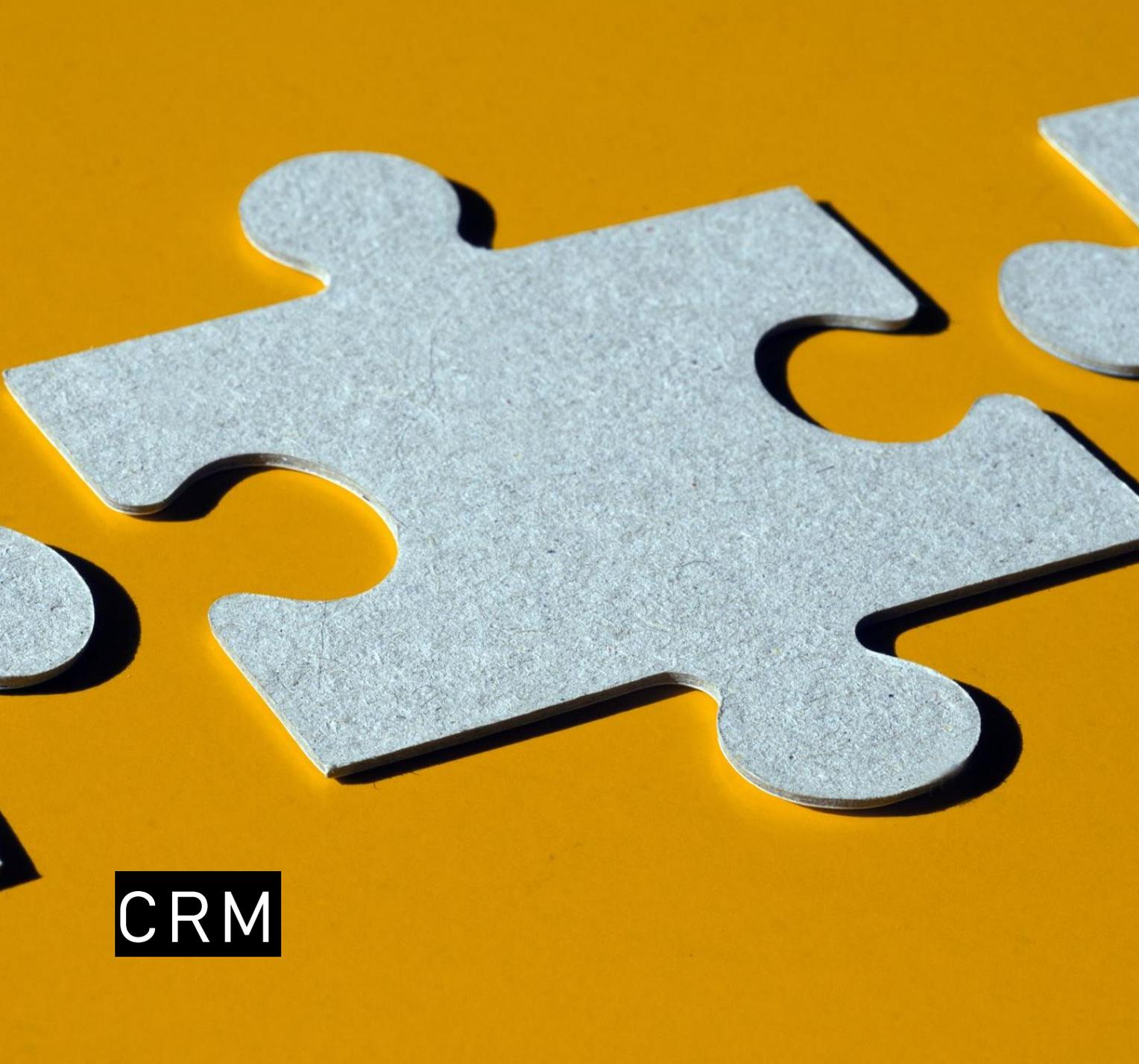
Aprovechar las
relaciones
existentes para
generar ingresos.

Mejorar los
servicios.

Promover la
fidelización

Estrategia de
servicios
proactiva

Estandarizar
proceso de venta

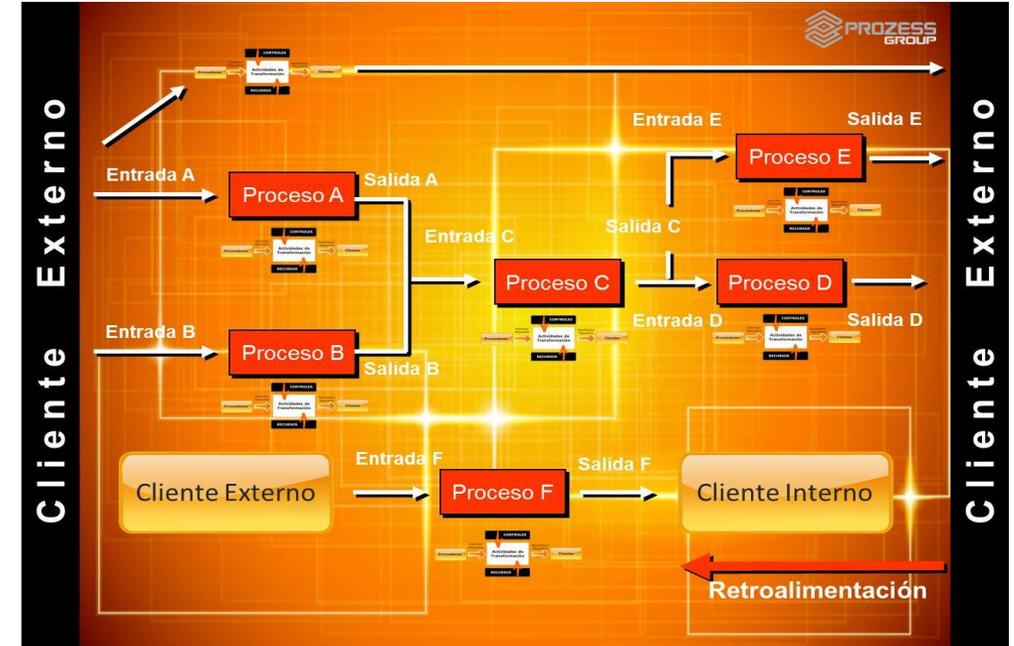


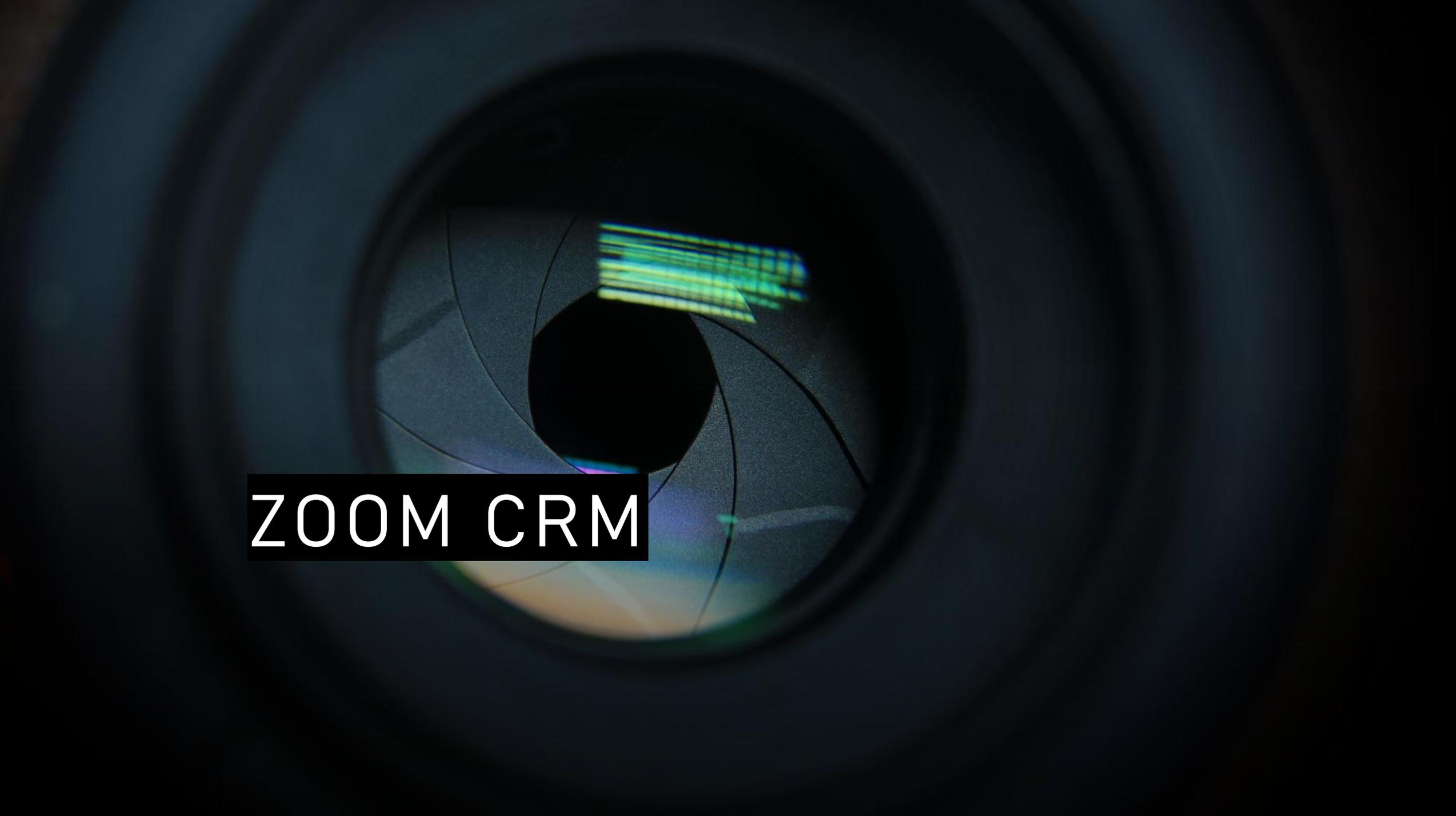
CRM

- CRM no solo afecta a los procesos que tienen relación directa con los clientes, sino también a muchos otros procesos internos

Clientes Internos

Cuando hablamos de cliente interno nos referimos a **aquellos que intervienen en el desarrollo de nuestro producto o servicio. Son nuestros empleados, colaboradores y proveedores.**



A close-up, artistic shot of a camera lens aperture. The lens is dark, and the aperture blades are visible, creating a central opening. A bright, multi-colored light flare (green, blue, and purple) is visible through the aperture. A black rectangular bar is overlaid on the lower-left portion of the lens, containing the text 'ZOOM CRM' in white, bold, sans-serif capital letters.

ZOOM CRM



LEADS,
OPORTUNIDADES,
INFORMES

PROCESO DEL CRM



Identificar a los clientes,



Diferenciarlos sus necesidades y de su valor para la compañía,



Interactuar con ellos en forma tal de mejorar la eficiencia en el costo y la efectividad de la interacción,

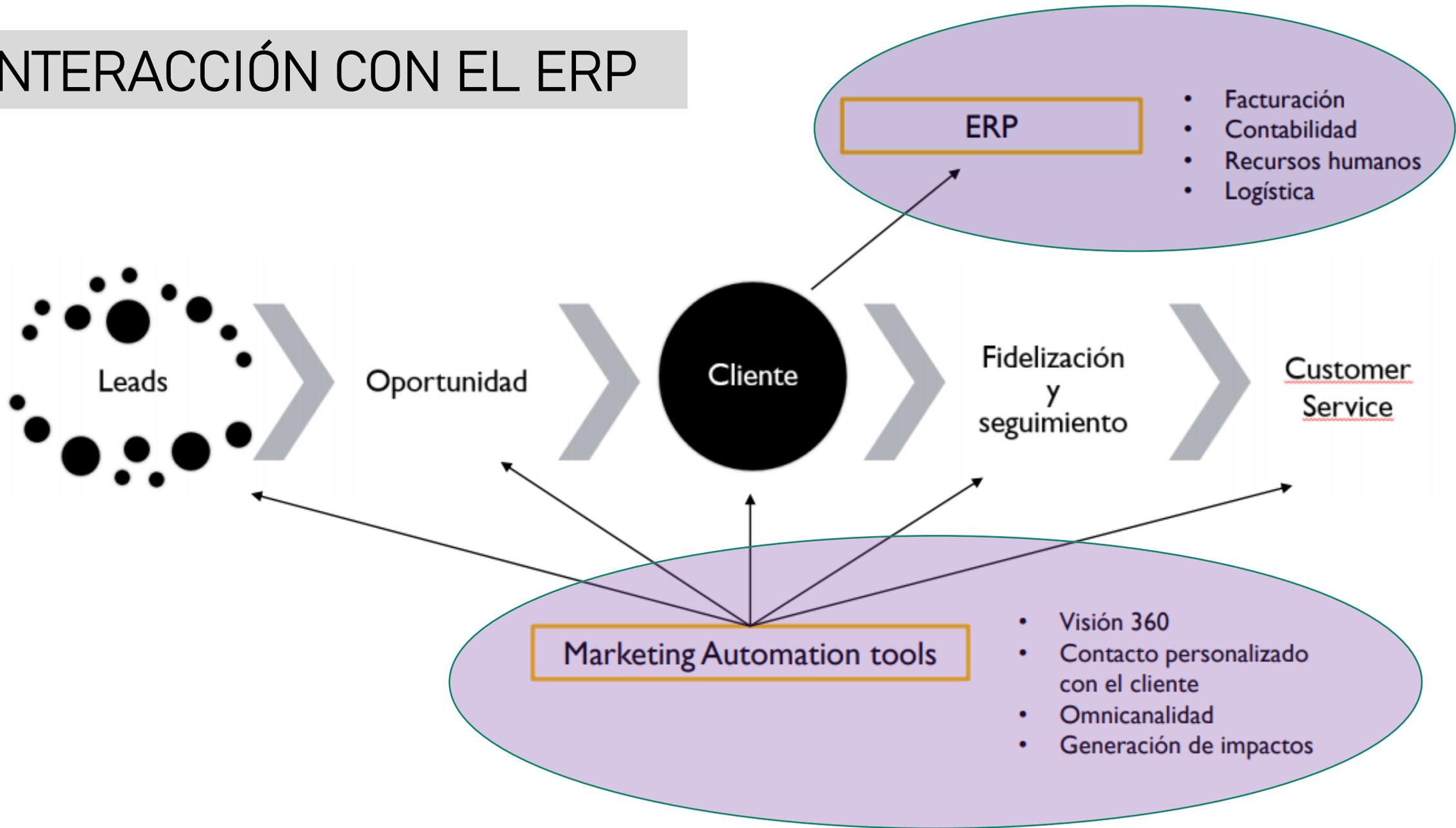


Adaptar algunos aspectos de los productos o servicios

QUÉ CUBRE UN CRM?



INTERACCIÓN CON EL ERP





CICLO

DE

VENTA

CRM

CICLO DE VENTA CRM



CICLO DE VENTA CRM



QUE HACE EL CRM

Capturar información sobre los clientes.

Consolida la información en las bases de datos.

Analizar los datos a través de herramientas

Identificar patrones de los clientes

Diseminar a los interesados

Incrementa tu productividad



Seguimiento de correo entrante



Tomar notas mientras visitas al cliente



Descubrir información relevante



Crear propuesta



Gestión de la cartera de clientes



Calificación

Desarrollo

Propuesta

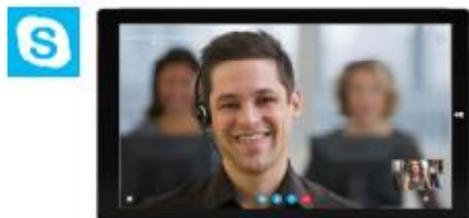
Cierre

Seguimiento de llamadas

Actualizaciones de ofertas

Colaboración a través de la organización

Generar cotización y compartir con el cliente





Players principales



TP4

TP4

TP1
INTRO E
INFOR

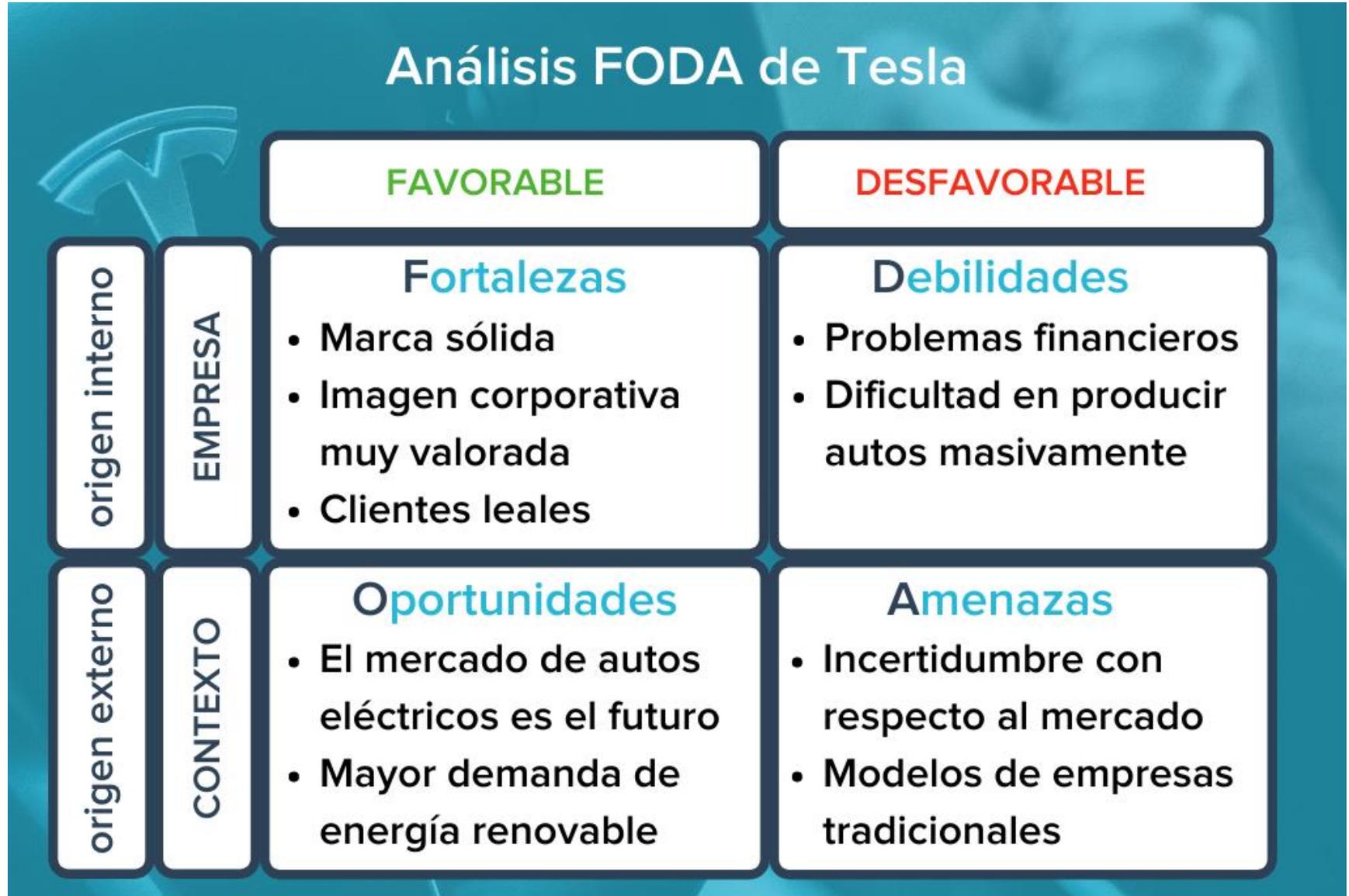
TP2
RELEVAMIENTO
Y ANALISIS

TP3
Datos E
Indicadores

TP4
INFORME
FINAL

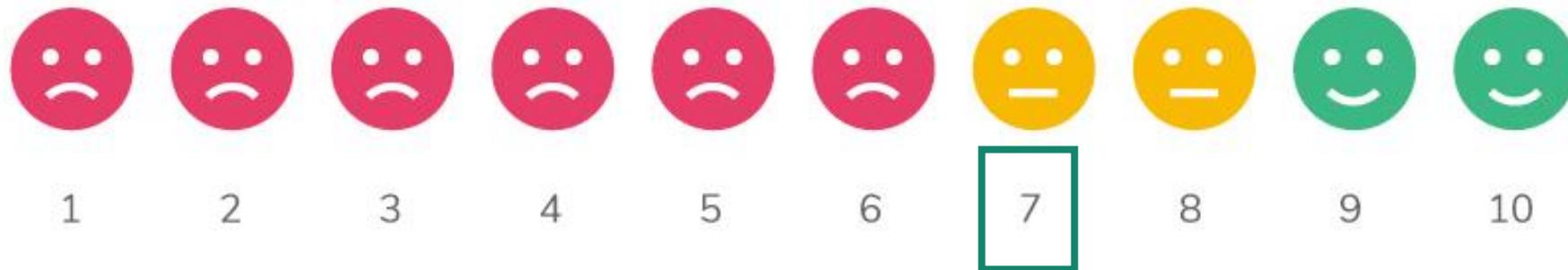
TP4

Diagnóstico



Análisis

a. ¿Cuánto utilizan los SI para la gestión de la empresa, a nivel general?



Análisis

f. Para la toma de decisiones, sacan reportes y kpi de los SI?



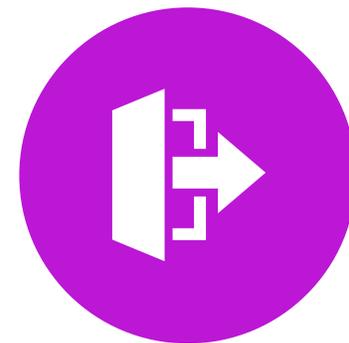
TP4

TP4

Identificar

		ANÁLISIS INTERNO	
		Fortalezas	Debilidades
ANÁLISIS EXTERNO	Oportunidades	Estrategias ofensivas (FO) Se generan opciones que utilizan las fortalezas para aprovechar las oportunidades	Estrategias de reorientación (DO) Se generan opciones que aprovechan las oportunidades, superando las debilidades
	Amenazas	Estrategias defensivas (FA) Se generan opciones que utilizan las fortalezas para evitar las amenazas	Estrategias de supervivencia (DA) Se generan opciones que minimizan las debilidades y evitan las amenazas

FIN



SISTEMAS DE
INFORMACIÓN

TP4

ANEXO CRM

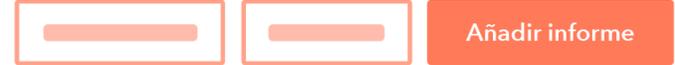
Mail ▾

- Inbox
- Starred
- ▶ Sent Mail
- Drafts (13)**
- Trash
- Snoozed
- ▶ Pipelines
- ▶ **Real Estate**
 - My Deals
 - By Month
 - Closed Deals
 - Commission View
 - ▶ Hidden pipelines
 - Less ▲
 - Important

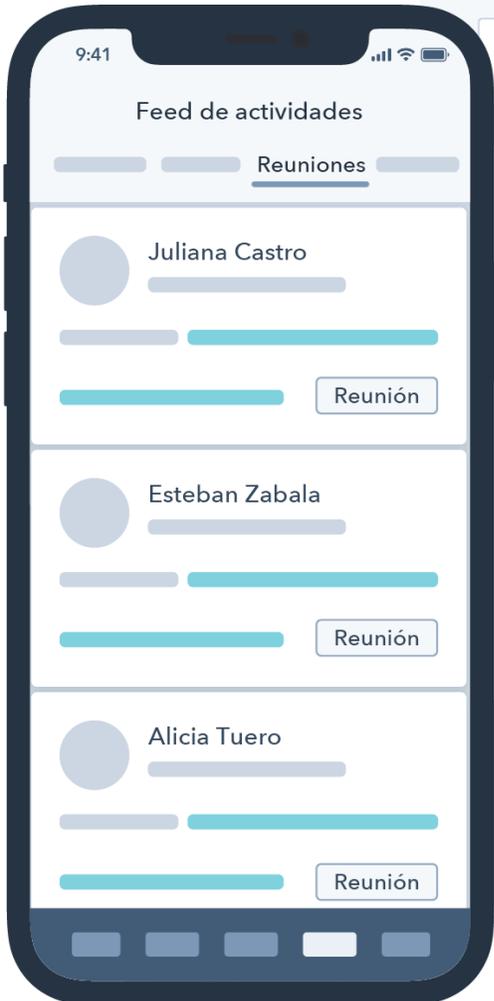
Real Estate									
		2	3	3	3	4			
		Lead	Contacted	First Appointment	Signed Exclusive Agreement	Searching			
▼	<input type="checkbox"/>	Name	Stage	Lead Score	Deal Size	Comm %	Total Comm	Closing	
▼ <input type="checkbox"/> Lead							21500		
	<input type="checkbox"/>	Wayne Carlson	Lead	1-Hot	780000	0.025	19500	Jul 31	
	<input type="checkbox"/>	Timmy Hogan	Lead	2-Warm	80000	0.025	2000	Aug 31	
▼ <input type="checkbox"/> Contacted							65850		
	<input type="checkbox"/>	Jean Keller	Contacted	2-Warm	960000	0.035	33600	Aug 31	
	<input type="checkbox"/>	Erick Hale	Contacted	1-Hot	930000	0.025	23250	Sep 30	
	<input type="checkbox"/>	Brody Burns	Contacted	1-Hot	300000	.03	9000		
▼ <input type="checkbox"/> First Appointment							67100		
	<input type="checkbox"/>	Terrance Bailey	First Appointment	1-Hot	370000	0.03	11100	Jun 30	
	<input type="checkbox"/>	Karla Henry	First Appointment	3-Cold	810000	0.05	40500	Jun 30	
	<input type="checkbox"/>	Darrell Aguilar	First Appointment	2-Warm	620000	0.025	15500	Aug 31	
▼ <input type="checkbox"/> Signed Exclusive Agreement							53500		



Generación de leads



Añadir informe



▶ <https://www.hubspot.es/>

3D Printers for GDI
 Opportunity · Sales Insights

03/20/20 Est. Close Date | \$90,000.00 Est. Revenue | In Progress Status | Brenden Thiel Owner

Opportunity Sales Process Active for 2 hours

Qualify (2 Hrs) | Develop | Propose | Close

Summary Product Line Items Quotes LinkedIn Sales Navigator Related

Topic	* 3D Printers for GDI
Contact	Regina Murphy
Account	Graphic Design Institu...
Purchase Timeframe	This Quarter
Currency	* Dollar
Budget Amount	\$95,000.00
Purchase Process	Committee
Description	Supply printers for their new expansion.

Timeline

Search Records

Enter a note...

What you've missed (Click To Filter)

- New activities (1)
- Emails (1)

RM Email from Regina Murphy
 Re: Thank you for the meeting CRM:0020038
[Hi Brenden, Thanks for the call. I look forward to meeting to disc...](#)
 Closed 6:51 AM

Phone Call from Brenden Thiel
 Follow up to schedule meeting
 Active 6:39 AM

Appointment from Brenden Thiel
 Meeting with 3D Printers for GDI

Assistant

Notifications

- 1 reminder
- Opportunity Closing Soon
3D Printers for GDI

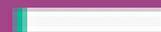
Opportunity score ⓘ

96 Grade A
 Improving

- Education is a strong industry
- Estimated revenue is similar to many successful opportunities
- Estimated close date is more than 2 weeks away
- Graphic Design Institute is a returning

- Home
- Recent
- Pinned
- My Work
- Sales accelerator
- Dashboards
- Activities
- Customers
- Accounts
- Contacts
- Sales
- Leads
- Opportunities
- Competitors
- Collateral
- Quotes
- Orders
- Invoices
- Sales

▶ <https://dynamics.microsoft.com/es-es/sales/overview/>



Your Pipeline

Search...

CREATE



New



Qualification



Proposition



Negotiation



Won

Interest in your Graphic Design Project
24,000.00€ - Agrolait
02/14/2016 : Email
★ ★ ☆



Plan to buy 50 keyboards and mouses
40,000.00€
02/14/2016 : Task
★ ☆ ☆



Need 20 Days of Consultancy
60,000.00€
02/13/2016 : Email
☆ ☆ ☆



Pricing Information of Services
1,000.00€
02/10/2016 : Email
★ ☆ ☆ 1



Trainee's training plan in your Organization
35,000.00€ - Delta PC
02/12/2016 : Call
★ ☆ ☆ 2



Need script to import external data
2,000.00€ - Camptocamp
02/17/2016 : Email
★ ☆ ☆



"Resource Planning" project development
9,000.00€ - Delta PC
Task
★ ★ ☆



Interest in your customizable Pcs
15,000.00€ - Camptocamp
02/09/2016 : Call
★ ☆ ☆



Would appreciate more information about your products
11,000.00€ - Camptocamp
02/17/2016 : Email
★ ★ ☆



Need a new design for my website
3,800.00€ - Delta PC
02/13/2016 : Task
★ ★ ☆



Plan to buy RedHat servers
25,000.00€ - Agrolait
02/13/2016 : Call
★ ☆ ☆



Interest in your Part Contract
19,800.00€ - China B
Call
★ ★ ☆



Interest in your product
2,000.00€ - Agrolait
02/11/2016 : Call
★ ★ ☆



Want to subscribe to solution
2,000.00€ - Think B
02/12/2016 : Email
☆ ☆ ☆



Need to customize the solution
4,500.00€
02/11/2016 : Call
★ ★ ☆



https://www.odoo.com/es_ES/trial?selected_app=crm



CRM



My work

All items

Today 6

- Alex Baker**
Intro phone call 96
9:00 AM • Lead
- Jane Cooper**
Email followup to web query 88
9:00 AM • Lead
- Wade Warren**
Follow-up call 65
9:00 AM • Lead
- Shawn McCoy**
Follow-up call 59
9:00 AM • Lead
- Esther Howard**
Email followup to web query 43
9:00 AM • Lead
- Cameron Williamson**
Follow up call 37
9:00 AM • Lead

Tomorrow 5

- Brooklyn Simmons**
Schedule a meeting with prod... 99
10:00 AM • Lead
- Leslie Alexander**
Schedule a meeting with pro... 96
10:00 AM • Lead
- Jenny Wilson**
Email followup to web query 74
10:00 AM • Lead
- Guy Hawkins**
Email followup to web query 74
10:00 AM • Lead

Qualify Disqualify Follow Assign

Alex Baker

Lead • Sales insights

Summary Details Related

CONTACT

Topic: Interested in demo

First name: Alex

Last name: Baker

Job title: Cafeteria manager

Business phone: +1 (425) 5380783

Mobile phone: + (123) 4567890

Email: alexbd365@outlook.com

COMPANY

Company: Trey Research

Website: www.treyresearch.net

Street 1: One Contoso Way

City: Redmond

State/Province: Washington

ZIP/Postal Code: 98052

Country/Region: United States

Up next

Intro phone call
Due by 9:00 AM
Discuss about scheduling a demo at the customer's site

Follow-up phone call
Introduction to our LOB

Schedule a meeting
Schedule a demo meeting at the customers site. Mention the unique proposal for Q4 deals.

Timeline

Search

Enter a note...

- Email from Alex Baker**
Hi there, thanks for reaching out. I'm happy t...
Closed 9/15/2019, 7:45 PM
- Email to Alex Baker**
Hi there, thanks for reaching out. I'm happy t...
Overdue 9/15/2019, 7:45 PM
- Email from Alex Baker**
Hi there, thanks for reaching out. I'm happy t...
Closed 9/15/2019, 7:45 PM

Web query Warm New Jacob Jones

Lead score

96 Grade A Improving

- Security is a strong industry
- "Subscribe to our new service, it's the best deal of the year" is a successful campaign.
- Budget is lower than average
- Intent to buy was detected in a recent email

Details

Who knows whom

- Cedric Dawson**
IT Manager
Get introduced
- Gus Richards**
IT Manager
Get introduced

Assistant

Notifications

3 reminders

Insights

5 suggested follow-ups

Calls

Enter name or number

1	2	3
4	5	6
7	8	9
*	0	#

Call

History Related All

- Alex Baker**
9/16/19 • 2:35 PM • 7m 52s
- Alex Baker**
9/16/19 • 2:35 PM • 7m 52s
- Alex Baker**
9/16/19 • 2:35 PM • 7m 52s

3D Printers for GDI
Opportunity · Sales Insights

5/31/2020 Est. Close Date | \$90,000.00 Est. Revenue | In Progress Status | **Brandon Stuart** Owner



Summary Relationship Analytics Product Line Items Quotes Related

Topic	* 3D Printers for GDI
Contact	Regina Murphy
Account	Graphic Design Ins...
Purchase Timeframe	This Quarter
Currency	* Dollar
Budget Amount	\$95,000.00
Purchase Process	Committee
Description	Supply printers for their new expansion.

Timeline

Search Records

Enter a note...

Activity Suggestions (preview)

- Appointment from Brandon Stuart Meet to review 3D printer needs 3/10/2020

Show all

Note modified by Brandon Stuart Meeting with Regina [Just finished a call with Regina. Send a proposal by Friday to...](#)

New email suggestion New Email Shall I send an email with the file? 2:16 AM

Write Email 1:37 PM

Assistant

Insights

- 1 suggested follow-up ^
- Email left unread Re: Thank you for the meetin...

Opportunity score ⓘ

96 Grade A Improving

- ▲ Education is a strong industry
- ▲ Estimated revenue is similar to many successful opportunities
- ▲ Estimated close date is more than 2 weeks away
- ▲ Graphic Design Institute is a returning

- Home
- Recent
- Pinned
- My Work
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- Leads
- Opportunities
- Competitors
- Collateral
- Quotes
- Orders
- Invoices
- Sales

Sent 12 March 6:21 AM . Last opened 12 March 7:03 AM

Closed 3/12/2020 7:03 AM

Email from Regina Murphy

Open Save



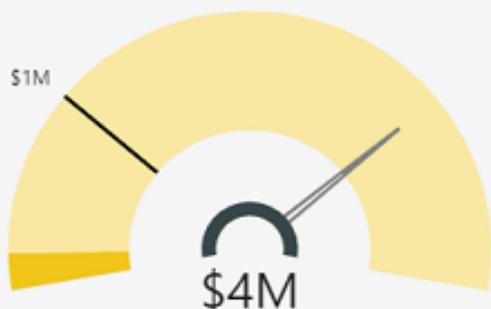
Sales Performance



Fiscal Period

FY20 ▼

Target



Goal Title	Actual	In Progress	Target	Percentage	Goal End Date	Goal Owner Name
Sales Target Q1	\$553,768	\$0	\$300,000	185.0	12/31/2019	tmp User
Sales Target Q2	\$2,655,849	\$48,000	\$350,000	759.0	3/31/2020	tmp User
Sales Target Q3	\$659,201	\$0	\$325,000	203.0	6/30/2020	tmp User
Sales Target Q4	\$198,501	\$195,000	\$375,000	53.0	9/30/2020	tmp User

\$12,667K

\$ Won Opportunities

65

Opportunities Won

\$194.9K

Avg Deal Size (Won)

0.0

avg. days in Qualify

0.0

avg. days in Develop

0.0

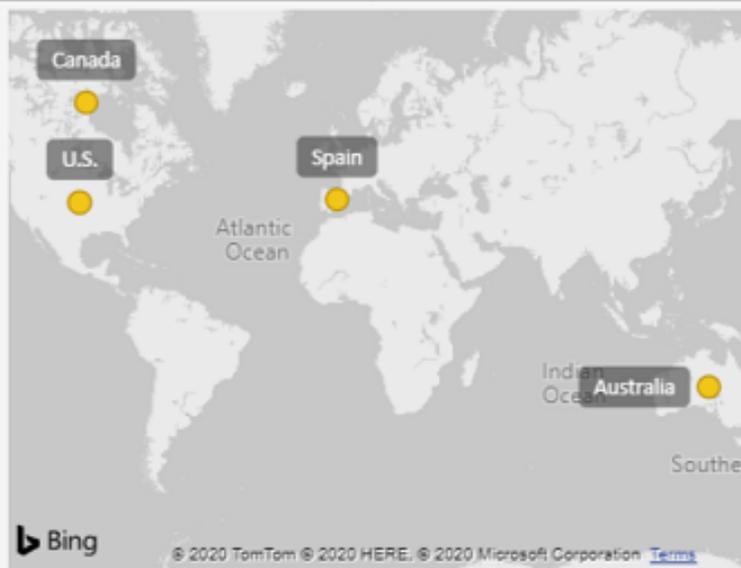
avg. days in Propose

0.0

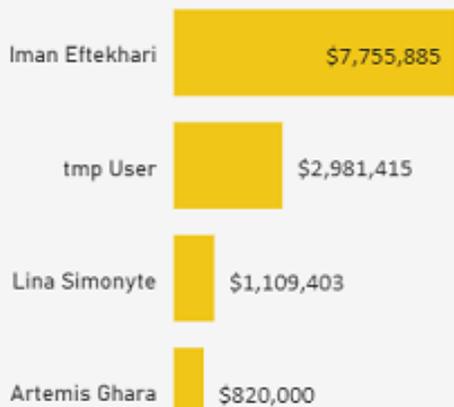
avg. days in Close

Upgrade to activate

\$ Won by Location



\$ Won by Salesperson



\$ Won Opportunities

Target and Actual by Fiscal Quarter

