# LOGO CRM

## THE SOFTWARE FOR SALES, MARKETING, AND SERVICES IN THE FIELD OF LOGISTICS

**editions**

# LOGO CRM

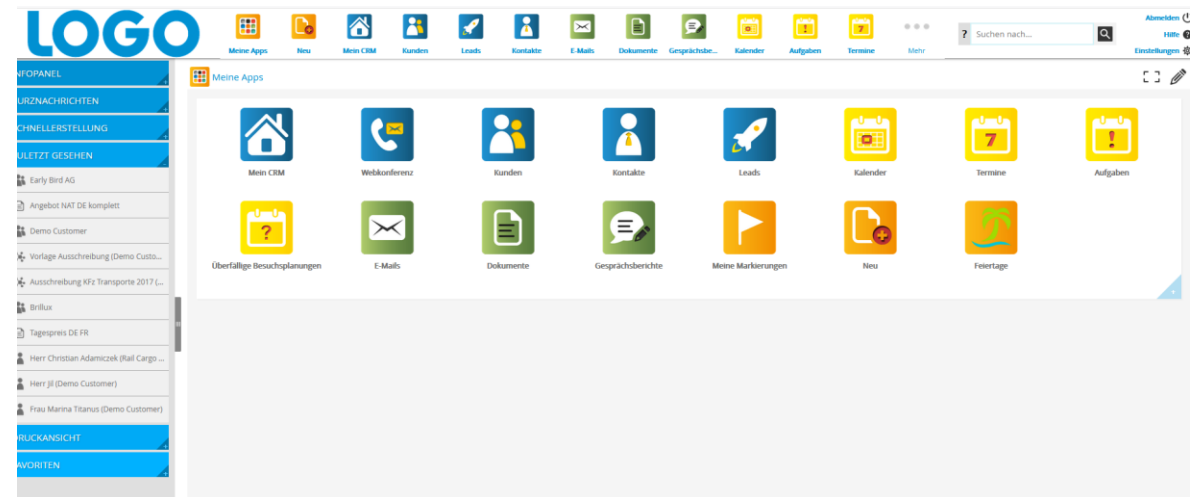It perfectly adapts to your needs – select the edition that fits you best from four available options!

**BASIS – SALES FORCE – BUSINESS - ENTERPRISE**

# BASIS EDITION

PERFECTLY COVERS BASIC FUNCTIONS:

- no customization required
- ideal for small teams without hierarchies
- quick implementation phase
- web-training is sufficient

Power for small teams: Simply LOGO – Simply get started!
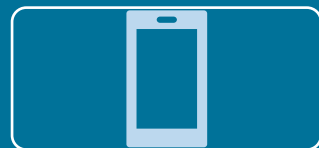
# BASIS EDITION – MODULE

- **GENERAL:**

### My CRM
- Self-organization
- What's relevant to me at a glance

### Full-text search
- Elastic Search
- LOGO knows the answer to your questions

### Device-independent
- Access the web application on the go
- PC, laptop, tablet, mobile device

### Web conferences
- Simply invite contacts from LOGO and start a conference
- Always stay connected

# BASIS EDITION - MODULE

- **CUSTOMER**

**AND CONTACT**

**MANAGEMENT**

### Customers
- Overview of all customer data
- All information about a customer bundled in a clearly organized customer file with map view

### Contacts
- Overview of all contact persons linked to respective accounts
- All necessary information ready to click (function, social media profiles, communication data, etc.)

### Leads
- Easy capture of an address for initial classification, which can develop into a customer
- Categorization options available

# BASIS EDITION - MODULE

- **TIME MANAGEMENT:**

**Calendar**
- Group calendar: Calendar view of all appointments for all CRM users
- Color differentiation of appointment types provides an easy overview

**Appointments**
- Overview of all appointments (internal and external)
- Synchronization with external calendars available (e.g., Outlook)

**Tasks**
- Overview of all tasks with key metrics (due dates, assigned to, etc.)
- Automatic creation of follow-up tasks ensures nothing is forgotten

# BASIS EDITION - MODULE

- **DOCUMENT MANAGEMENT:**

### Documentations
- Relevant customer documents classified by document types (email, note, contact report) and status (open, positive, negative)
- Structured storage

### Emails
- Receiving and sending emails from the CRM
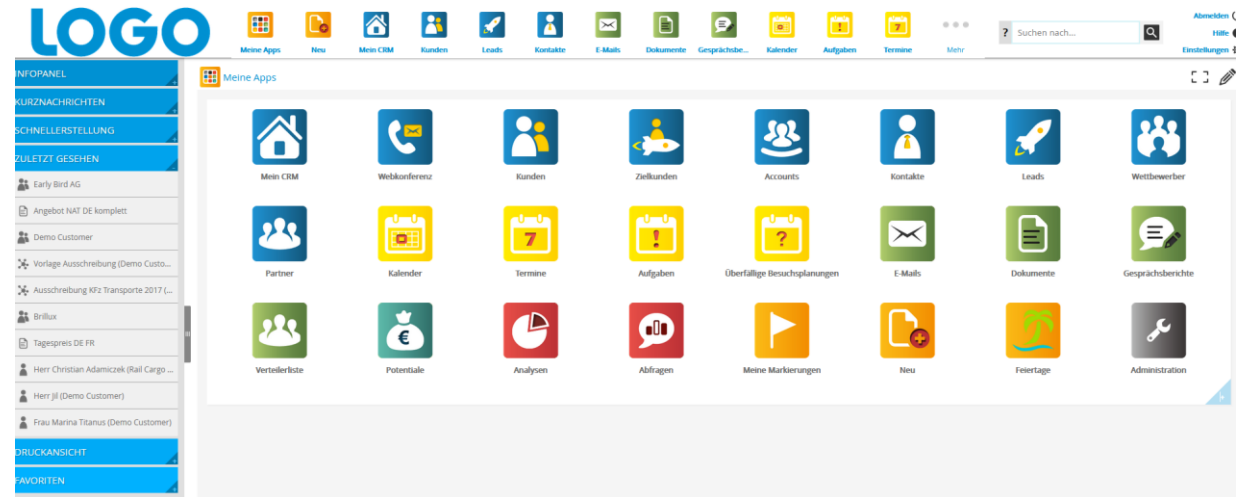- Automatic saving of emails in the correct customer file

### Contact report
- Structured documentation of customer conversations
- Easy and quick recording! Voice dictation function also available!

# SALES FORCE EDITION

**OVERVIEW & COOPERATION:**
- customizable to your needs
- module extensions possible
- interfaces available
- advanced righs system



Structure for teams of all sizes with flat hierarchies

*\*MODULE EXTENSION = MODULES FROM ANOTHER EDITION CAN BE ADDED INDIVIDUALLY*

# SALES FORCE EDITION (BASIS +) - MODULES
## *INTERFACES AND MODULE EXTENSIONS POSSIBLE*

- **GENERAL:**

**Administration**
- Powerful no-code administration tool for individual customisation (masks, mandatory fields, select lists, etc.)

- **CUSTOMER**

**AND CONTACT**

**MANAGEMENT**

**Target customers**
- Management of potential new customers (pipeline)
- Qualification of opportunites reflects the lifecycle

**Competitors**
- Creation and management of existing competitors in the market
- Assignment to relevant customers / target clients

**Partners**
- Handling information about partners and agents
- Capability to expand to an sophisticated agent module

# SALES FORCE EDITION (BASIS +) - MODULE
## *INTERFACES AND MODULE EXTENSIONS POSSIBLE*

- **DOCUMENT**

**MANAGEMENT**

**Documentations**
- Additional document types
- Structured storage

**Customer projects**
- Management of upcoming RFQs and projects (status, responsibilities, etc.)
- Appropriate for tenders

**Distribution list**
- Creation and management of various distribution lists for sending important documents

# SALES FORCE EDITION (BASIS +) - MODULE
## *INTERFACES AND MODULE EXTENSIONS POSSIBLE*

- **POTENTIAL MANAGEMENT**

- **REPORTS AND ANALYTICS**

**Opportunities**
- Structured documentation of future business, both from existing customers and target customers (new trade lanes, new divisions, new services)
- Sales funnel (sales stages linked with probability of closing)

**Reports**
- Creation of up to 6 standard reports with visualization (predefined logistics and sales reports)

**General report**
- Creation of custom database queries

# ADDITIONAL FEATURES* OF THE SALES FORCE EDITION

**Map view: Differentiation between customer / target customer**

**Appointment feedback**

*Detailed feature description see slide 31

# BUSINESS EDITION

SALES PERFECTLY ORGANIZED:

- Standard interfaces available
- Cross-branch organisation
- Powerful analytics tool
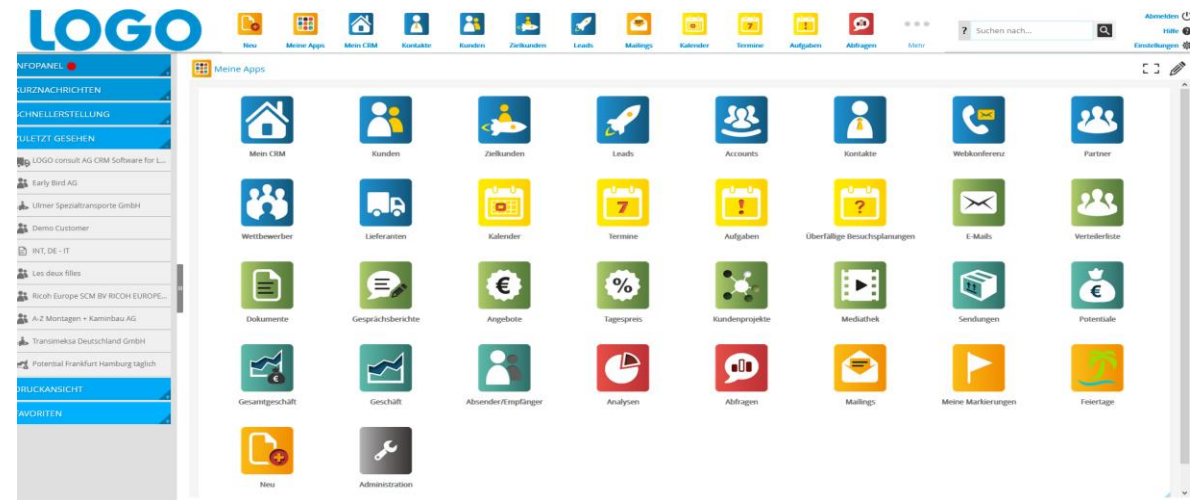


Most popular edition!★ – System for teams of all sizes with complex structures

# BUSINESS EDITION (SALES FORCE +)
## *2 STANDARD INTERFACES INCLUDED, MODULE EXTENSIONS POSSIBLE*

- **CUSTOMER AND CONTACT MANAGEMENT:**

**Suppliers**

- Structured recording of suppliers
- Possibility to store documents, etc.

- **MAILING MANAGER**

**Mailing manager**

- One-to-many e-mail marketing: personalized e-mail dispatch to a defined group of people (e.g. newsletters, promotions, invitations, etc.)

# BUSINESS EDITION (SALES FORCE +)
## *2 STANDARD INTERFACES INCLUDED, MODULE EXTENSIONS POSSIBLE*

- **DOCUMENT**

**MANAGEMENT:**

**Documentations**
- Additional document types
- Structured storage

**Quotes**
- Management, preparation and evaluation of quotations
- OPN status, price, trade lane, attachments, etc.

**Spot quote**
- Management, creation, and evaluation of daily price inquiries
- OPN status, price, tradelane, etc.

**Media center**
- Central management of current documents (company presentations, etc.)
- Sending directly from CRM possible

# BUSINESS EDITION (SALES FORCE +)
## 2 STANDARD INTERFACES INCLUDED, MODULE EXTENSIONS POSSIBLE

- **SHIPMENTS**

**& POTENTIALS:**

**Consignee / Shipper**
- Recording and viewing of all consignees / shippers

**Shipments**
- Overview of all shipments for all customers
- Transfer from Operative via interface

**Active shipment**
- Cumulative display of shipments from all customers
- Comparison of different time periods

**Shipment flow**
- Comparison of current business (shipments) and potential business (opportunities)

# ADDITIONAL FEATURES* OF THE BUSINESS EDITION

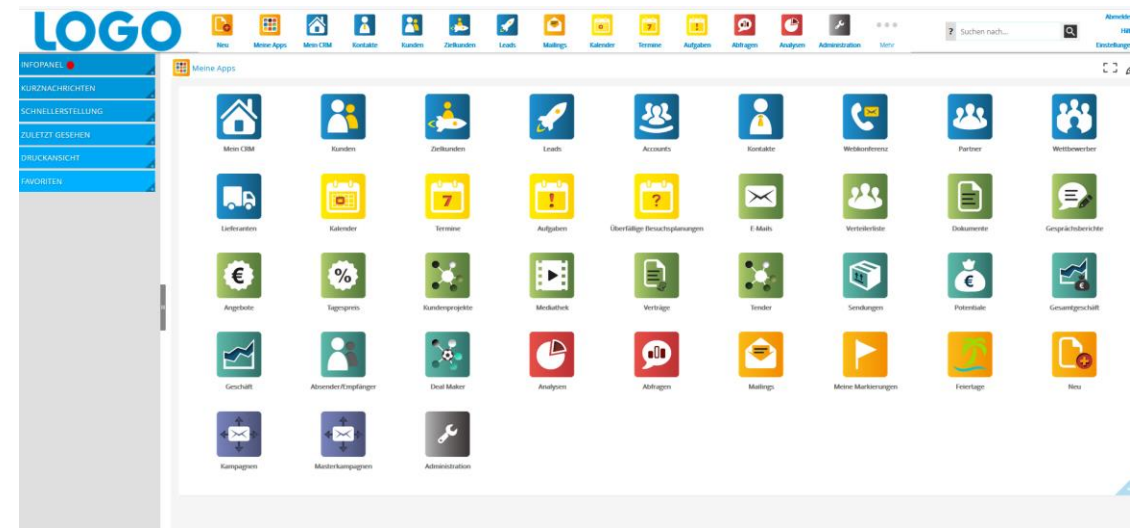| | | | |
|---|---|---|---|
| **Event generator** | **Potential generator** | **Business card scan function** | **Target customer alarm** |
| **Localisation / translation tool** | **ABC - Analysis** | **Web2Office** | **Shipment frequency alert** |

*Detailed feature description see slides 31, 3

# ENTERPRISE EDITION

UNLIMITED CRM FEATURES:

- Module variety for all areas
- Dashboards and visualizations
- Easy analysis



Teamwork GLOBAL: Centralized sales management and analytical CRM

# ENTERPRISE EDITION (BUSINESS +) - MODULE

- **DOCUMENT**

  **MANAGEMENT:**

**Documantations**
- Additional documents
- Structured storage

**Document terms**
- Storage of individual conditions per customer

**Customer projects**
- Managing participation in a tender (division into subtenders, responsibilities, approval processes, etc.)

**Contracts**
- Storage of rates and contracts, automatic reminder upon expiration
- Overview of current contracts (rights-controlled)

# ENTERPRISE EDITION (BUSINESS +) - MODULE

- **HUNTING MODUL:**

**Deal Maker**
- Hunting made easy: Identification and vizualisation of show stoppers
- Make the deal quicker

- **CAMPAIGNS:**

**Campaign manager**
- Management of time-based actions/events: status feedback, cost overview, marketing campaigns, etc.

**Master campaign**
- Bundling individual campaigns into a master campaign

20

# ADDITIONAL FEATURES* OF THE ENTERPRISE EDITION

| | | | | | |
|---|---|---|---|---|---|
| LOGO PI | SPM | Target/actual comparison | Document creation by e-mail | GB Deluxe | Dashboards |
| Business Farm | Agent module | XRM module | Parent company | Quotation toolbox | Crefo queries |
| Compliance / Blacklist request | Connection to Active Directory (Azure Entra) | Centralized control of email signature | Potential analysis | Import manager | Duplicate cockpit |

*Detailed feature description see slide 31, 32, 33*

# FEATURE OVERVIEW
# LOGO CRM

Basis – Sales Force – Business – Enterprise

| | Basis | Sales Force | Business | Enterprise |
|---|---|---|---|---|
| My CRM | ✓ | ✓ | ✓ | ✓ |
| Full-text search | ✓ | ✓ | ✓ | ✓ |
| Device-independent | ✓ | ✓ | ✓ | ✓ |
| Web conference | ✓ | ✓ | ✓ | ✓ |
| Customers | ✓ | ✓ | ✓ | ✓ |
| Contacts | ✓ | ✓ | ✓ | ✓ |
| Leads | ✓ | ✓ | ✓ | ✓ |
| Calendar | ✓ | ✓ | ✓ | ✓ |
| Appointments | ✓ | ✓ | ✓ | ✓ |
| Tasks | ✓ | ✓ | ✓ | ✓ |
| Documentations | ✓ | ✓ | ✓ | ✓ |
| Mails | ✓ | ✓ | ✓ | ✓ |
| Contact report | ✓ | ✓ | ✓ | ✓ |
| Administration | | ✓ | ✓ | ✓ |
| Target customers | | ✓ | ✓ | ✓ |

| | Basis | Sales Force | Business | Enterprise |
|---|---|---|---|---|
| Competitors | | ✓ | ✓ | ✓ |
| Partners | | ✓ | ✓ | ✓ |
| Customer projects | | ✓ | ✓ | ✓ |
| Distribution list | | ✓ | ✓ | ✓ |
| Opportunities | | ✓ | ✓ | ✓ |
| Reports | | ✓ | ✓ | ✓ |
| General reports | | ✓ | ✓ | ✓ |
| Interfaces | | ✓ | ✓ | ✓ |
| Module extension | | ✓ | ✓ | ✓ |
| Pin map | | ✓ | ✓ | ✓ |
| Appointment feedback | | ✓ | ✓ | ✓ |
| Suppliers | | | ✓ | ✓ |
| Mailing manager | | | ✓ | ✓ |
| Quotes | | | ✓ | ✓ |
| Spot quote | | | ✓ | ✓ |

| | Basis | Sales Force | Business | Enterprise |
|---|---|---|---|---|
| Media center | | | ✓ | ✓ |
| Consignee / Shipper | | | ✓ | ✓ |
| Shipments | | | ✓ | ✓ |
| Active Shipment | | | ✓ | ✓ |
| Shipment flow | | | ✓ | ✓ |
| Event generator | | | ✓ | ✓ |
| Potential generator | | | ✓ | ✓ |
| Business card scann | | | ✓ | ✓ |
| Target customer alert | | | ✓ | ✓ |
| Label editor | | | ✓ | ✓ |
| ABC analysis | | | ✓ | ✓ |
| Web2Office | | | ✓ | ✓ |
| Shipment frequency alert | | | ✓ | ✓ |
| Document terms | | | | ✓ |
| Tender | | | | ✓ |

| | Basis | Sales Force | Business | Enterprise |
|---|---|---|---|---|
| Contracts | | | | ✓ |
| Deal Maker | | | | ✓ |
| Campaign | | | | ✓ |
| Master campaign | | | | ✓ |
| LOGO PI | | | | ✓ |
| SPM | | | | ✓ |
| Target/actual comparison | | | | ✓ |
| Document by mail | | | | ✓ |
| GB Deluxe | | | | ✓ |
| Dashboards | | | | ✓ |
| Business Farm | | | | ✓ |
| Agent module | | | | ✓ |
| XRM-Module | | | | ✓ |
| Parent company | | | | ✓ |
| Quotation toolbox | | | | ✓ |

| | Basis | Sales Force | Business | Enterprise |
|---|---|---|---|---|
| Crefo queries | | | | ✓ |
| Compliance / Blacklist | | | | ✓ |
| LDAP connection | | | | ✓ |
| Email signature | | | | ✓ |
| Potential analysis | | | | ✓ |
| Import manager | | | | ✓ |
| Duplikat cockpit | | | | ✓ |

- MOBILE USE

- POWERFUL FEATURES

- EASY TO USE

- CONFIGURED ESPECIALLY FOR LOGISTICS COMPANIES

- FAST AND EASY INTEGRATION INTO YOUR IT LANDSCAPE

- LOGISTICS CRM MADE & HOSTED IN GERMANY

# LOGO CRM in general

- SPECIALIST IN THE DIGITALIZATION OF PROCESSES IN SALES, MARKETING, AND SERVICES

- MORE THAN 25 YEARS ON THE MARKET

- EUROPEAN, MEDIUM-SIZED, OWNER-MANAGED SOFTWARE COMPANY

- COMMUNICATION AT EYE LEVEL

- YOUNG, INNOVATIVE TEAM WITH EXPERIENCED MANAGEMENT

- ANALYSIS, CONSULTING, SOFTWARE DEVELOPMENT, PROJECT MANAGEMENT, AND PERSONAL SUPPORT

- LOGISTICS CRM MADE & HOSTED IN GERMANY

**LOGO** consult AG – Your partner at eye level

**How much standardization is desired? How much individuality is needed?**

**With LOGO as a partner, you don't need to ask these questions at all!**

With our **logistics** expertise, we not only understand your processes and speak your language, but **LOGO** CRM is the standardized industry solution specifically developed for transport and logistics. At the same time, our agile software development allows us to meet your individual requirements in the best possible and uncompromising way.

# FEATURE – DETAILED EXPLANATIONS

**Sales Force Edition:**

- **Customer file / Target customer file:** Segmentation of customers and target customers in the map view using different pin colors

- **Appointment feedback:** Display of information about appointment feedback in the info panel
 (who accepted/canceled the appointment and when)

**Business Edition:**

- **Event generator:** Batch creation of multiple appointments/tasks; task distribution to employees possible

- **Potential generator:** Creation of any number of potentials with just a few clicks

- **Business card scan function:**  Contact creation / update of contact data by sending a scanned business card to the CRM

- **Target customer alert:** Proactive notification when a new address is created by the operations

# FEATURE – DETAILED EXPLANATIONS

**Business Edition:**

- **Localization / translation tool:** In-depth renaming, localization into other languages

- **ABC analysis:** Categorization of customers by sector based on shipment behavior

- **Web2Office:** Advanced integration of MS Office; automatic filing

- **Shipment frequency alert:** Proactive notification from the CRM when a customer's shipment frequency is exceeded

**Enterprise Edition**

- **LOGO PI:** CRM Business Intelligence: Custom calculations, groupings, visualizations

- **SPM:** Visualization of my current performance (can I achieve my goal?)

- **Target vs. Actual Comparison:** Customer performance representation per year: Comparison of estimated annual revenue with actual revenue (determined from shipment data)

# FEATURE – DETAILED EXPLANATIONS

**Enterprise Edition:**

- **Document creation via email:** Automatic generation of daily price or call report based on email.

- **GB Deluxe:** Reading and displaying already known customer data; proactive notifications to other departments; customer satisfaction.

- **Dashboards:** Display of individual KPIs; management, sales, customer, trade lane dashboards, and more.

- **Business Farm**: Farming made easy: Clear display of the development of existing customers (special features, SWOT analysis, forecast of future business).

- **Agent module:** Analysis showing which shipments came through which agents; which customers work with which agents.

- **XRM Module:** Display of the relationship network of various participants (suppliers, agents, senders, competitors, customers) in logistics.

- **Parent company:** Representation of corporate structures with a report on subsidiaries.

# FEATURE – DETAILED EXPLANATIONS

**Enterprise Edition**

- **Quotation Toolbox:** Comprehensive toolkit for offer generation in CRM; individual adjustments.

- **Crefo Queries:** Traffic light graphic based on Credit information, AUTOMATICALLY retrieved from Crefo.

- **Compliance / Blacklist Inquiry:** Compliance / blacklist inquiry when creating a customer via LOGO.

- **Integration with Active Directory / Azure Entra (LDAP):** Automatic creation of users based on Microsoft Active Directory.

- **Central control of email signature:**  Central management of email signatures for individual users.

- **Potential Analysis:** Clear summary display of revenues from potentials, per sector and sales stage.

- **Import manager:** Import of datasets, created and executable by the administrator.

- **Duplicate cockpit:** Improving data quality! Display of probable duplicates of addresses; option to merge addresses.