



DATA SHEET

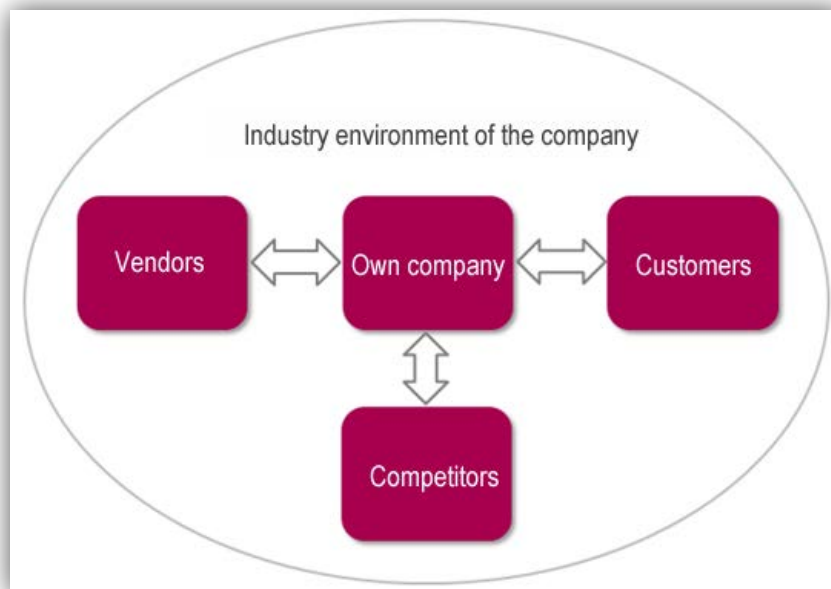
Companies

Companies working in a project-oriented way need information about their external and internal projects from the project management system, as well as market information that may affect the target and performance data of these projects. This is important in a sense of pre- and post-processes (such as providing offers and invoices).

Project management and market-oriented perspective

The market analysis primarily consists of companies' data from the company's own environment:

1. Customers, potential customers and interested parties are the most important goods of a company in the perspective of a Customer Relationship Management (CRM): A CRM covers the entire customer life cycle and includes planning, controlling and operation of all interactive processes with the customers.
2. Vendors and partners, with existing or initiating business relations: Management and departments want to seek information about companies, the respective contact persons, agreed prices and cost rates, products and services, etc. without much effort.
3. It is also important to keep an eye on the competitors: It is always good to know how your own products and services are positioned in the market. Where is your advance or where are improvements possible? This possibly can result in strategies and measures that can be implemented as new projects.



Market analysis of companies from the own environment

4. The project implementation is the fourth relevant perspective: The project managers need essential information on customers and vendors of their projects. The management wants focused information on the above-mentioned company types and also the marketing and sales departments rely on meaningful and information – up-to-date and without overlapping.

Based on these economic considerations, KLUSA offers the module COMPANIES.

The Companies module

The COMPANIES module offers the following functionality:

- Selection of the company types Vendor, Customer or Competitor
- Overview of all companies by type as a list plus filtering functionality
- Management of the companies, general data, contacts, products and services

- Display of the linked projects per company
- Interactive list of business-related activities incl. integrated e-mail notification
- Integrated Document Management System (DMS)
- Scoring options for the single companies based on the benefit analysis method
- Scoring chart for all types of companies (as bubble chart)
- Linking the company types Vendor and Customer to the PROJECTS module
- Display of personal company activities ("to-dos") in the MYKLUSA module
- Various possibilities to configure the companies attributes in the ADMINISTRATION module

Creation and administration of companies

Sales, marketing and purchasing staff organizes companies' data for the customer and vendor management or for a competitor comparison according to their types. Here you have the following options:

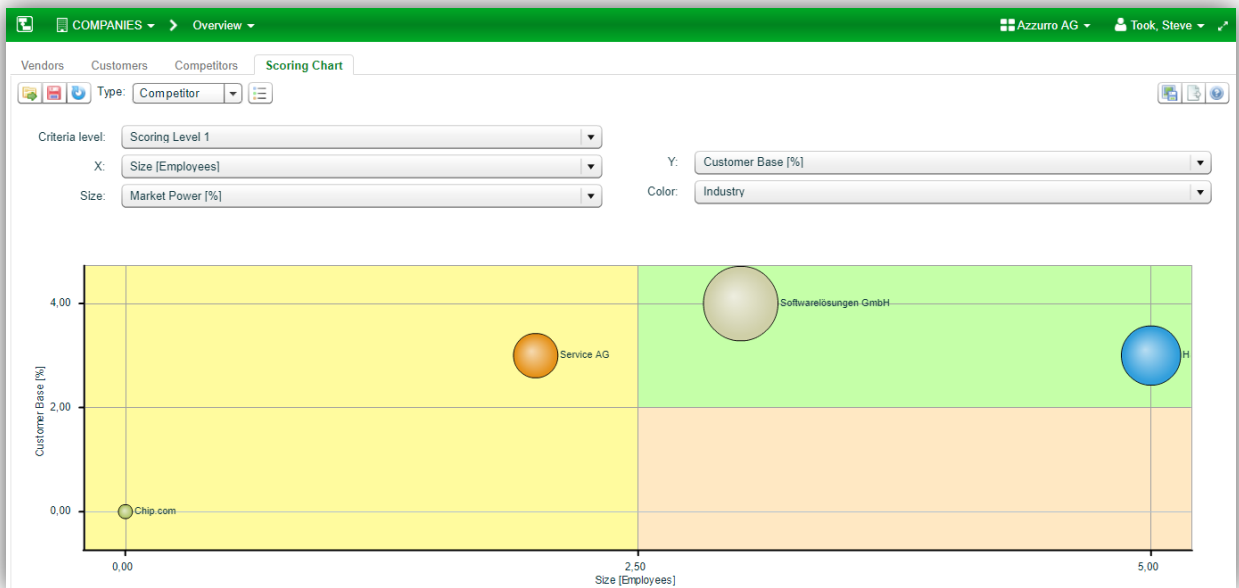
- Entering and maintaining the companies based on general companies data, descriptions and addresses as well as financial and billing data
- Data of the company's contact persons can also be edited in the project
- Documentation of list and special prices for products and cost rates for services
- Scoring of the companies incl. economic values and benefit analysis data (display of the results as bar and bubble chart)
- Entering activities in task lists for different measures; optional email notification for responsible at start and completion
- Integrated DMS for the structured storage of documents, such as offers, invoices, statistics, service descriptions, graphics, notes, emails etc. into folders and subfolders
- Display of the project links for Vendors and Customers, and project-specific scoring for Vendors

Activities workflow

Activities offer an overview and editing of tasks for the respective company. You can also forward the activities to employees and use them as reminders. Thus, you can create and describe activities for a variety of tasks and measures. When due dates are reached emails can be sent to managers and responsables automatically.

Scoring of competitors

Besides the pure gathering of information about competitors and their products, you can examine your own position in the market with a flexible scoring procedure including various criteria from different perspectives (such as technical, professional, or commercial). This way, you can better judge market trends, chances of success, price development, period of induction etc. Of course, you may also adopt the same method to (potential) customers and interested parties with a different focus.



Scoring chart of all companies (here: competitors)

Evaluation of vendors by the project manager

In the PROJECTS module it is possible to assign one or more vendors to a project. This makes the cooperation with the project easier. For this purpose, KLUSA offers the following functionality:

- Searching, assigning and categorizing of vendors for the project
- View of general vendors data
- View of the product and service portfolio of vendors
- Data of contact persons
- Entering and evaluation of vendors quality per project

The evaluation table shows the average rating of all projects for 'Programmier GmbH'. It includes a table with columns for criteria, description, min/max values, weight, and overall value, along with a progress bar for each criterion.

#	Criteria	Description	Min.	Max.	Weight	Value	1,00	5,50	10,00
1	▲ Total		1,00	10,00	1,00	8,13	[Progress bar]		
1.1	Competence		1,00	10,00	0,30	8,33	[Progress bar]		
1.2	Quality		1,00	10,00	0,30	8,00	[Progress bar]		
1.3	Price/Performance		1,00	10,00	0,20	8,33	[Progress bar]		
1.4	Punctuality		1,00	10,00	0,10	7,67	[Progress bar]		
1.5	Honesty		1,00	10,00	0,10	8,00	[Progress bar]		

Overall evaluation of companies (here: vendors)

Summary

With the COMPANIES module, sales, marketing, purchasing staff as well as product management and project management responsables can work with the same data and scorings.

- **Customers:** In addition to a classic CRM system, you can link a customer to a project in KLUSA; e.g. so that the project manager can immediately see existing general and scoring data. Thus data can be managed and reused centrally without another tool.
- **Vendors:** Central vendor evaluations and project scorings (and reviews) on suppliers provide a clear base for the systematic selection of fitting vendors for future projects.
- **Competitors:** Discover your own strengths as well as opportunities for improvement by market and competitor analysis; planning and implementation of suitable strategic and operational measures in new projects

KLUSA makes strategic and operational steps easy by concentrating information and sequences in one tool for many process roles (like project managers and participants, steering and control committees, the management levels: executive / board, head of area, function, and department, sales and marketing) Please contact us! We show you how you can successfully use KLUSA inside your company. Ask for a KLUSA presentation and decide for yourself.



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