



Simulation preparation for Developers

Please do not share this information with the other groups.

Within your company, you belong to an organisation responsible for the development and deployment of the CaseTrack tool (the Developers) and you will have your **first meeting** with potential clients from two other organisations (the Clients).

You know the following about one of the organisations:

- They have a track record of developing software solutions with partners
- Your assessment of this Audience is as follows:
 - Their main concerns are:
 - Functionality and bugs
 - Collaboration and support
 - Their principal expectations are to:
 - Get stronger and more competitive (performance)
 - Have challenging, learning experiences (growth)
 - Their viewpoint is that:
 - It's a good idea to acquire software if it's possible – the cost of writing and maintaining their own is very high
 - Even if they don't adopt the software in the end, they can learn a lot from evaluating it

The representative of the second client organisation was invited along at the last moment (by the rep of the first organisation) and you know nothing about them.

Your long-term objective is to have CaseTrack accepted as the standard tool in its class throughout the company.

Sync up with other members of your group before the meeting. Agree on your MAP (My objectives, Audience, Plan). Decide on the role that each of you will play in the meeting.

The simulation will be carried out in English.

Some information on CaseTrack can be found on the next sheet.

CaseTrack

CaseTrack is a cloud-based CRM solution, designed for technical support, marketing, and sales. It does not require any technical knowledge to set up and manage. It redefines the way businesses connect with the customers by creating a more meaningful relationship. By giving a single view of each client interaction, CaseTrack massively improves the efficiency of all interactions with external organisations.

Issue tracking

CaseTrack makes the tracking of issues easier and faster. The system has a built-in Gantt chart where you can see the issues with a start and due date. All issues with just a start date, on the other hand, can be seen on the calendar, which also provides users with a monthly view of their existing projects.

Time tracking

CaseTrack allows project management teams to track the number of hours they have logged to a particular project or issue. Hence, assessing their efficiency and productivity can also be easier.

Contact Management

CaseTrack assures a hassle-free contact management by giving an access to critical data of the customers and interaction history.

Opportunity Management

CaseTrack lets you to view the activity timeline of your customers. Also, it depicts the various stages of a deal, helping you to decide your next move. In addition, you can view critical details of the activity timeline along with the business competitors.

Quote Management

CaseTrack CRM simplifies your sales and business processes with forecasting and productivity tracking. Quote management allows you to track the components of your deal and it includes the standard price, quantity, product code, and quoted price.

Analytics

CaseTrack's analytics offers you high business intelligence that helps to unlock complicated sales as well as service insights. It also connects users to sales, service, and community clouds with embedded dashboards. It consistently demonstrates data as well as insights to the employees and partners.

Lead Management

CaseTrack's lead management up-to-date contacts on the timeline with the industry best practices. Also, it uses the sales path to understand the relevant documents. Functioning as a fast lead converter machine, this CRM app informs you about the original source of the leads.

Dynamic Dashboards and Custom Reports

CaseTrack gives a visual representation of how your business is performing. Users can recognize market trends, clear up the quantities, and calculate the activities. In addition, you can inspect the performance of your team directly on the dashboard.

Mobility

The CaseTrack mobile app allows users to access CRM data at anytime and from anywhere.

Email Integration

CaseTrack email service accesses your Gmail and Outlook inboxes to synchronize emails.

Files Sync and Share

The CaseTrack document management system enables you to share files from any device at any time.