

Service Description:

Why OpenERP/Odoo CRM?

If your Digital Marketing Strategy includes more than just CRM but you are planning a phased implementation then OpenERP/Odoo may be the perfect choice for you. It is a free, open source, modular, app based, comprehensive suite of business applications including Sales, CRM, Project management, Warehouse management, Manufacturing, Accounting and Human Resources. It is able to meet specific customer needs thanks to the flexibility of its object oriented framework (OpenObject). With OpenERP/Odoo, you do not have to pay any licensing fee so you can focus more on expanding your business and driving innovation. Moreover, with its modular and open architecture, you can start with modules of your choice and slowly add more modules as your business grows!

OpenERP/Odoo has been designed for the cloud from the start, which means you do not need to break your budget on expensive hardware and consulting. All you need is a desktop, laptop, tablet or even a smartphone with an Internet connection!

OpenERP/Odoo provides intuitive, simple to use, drill down dashboards to give you a quick, real time snapshot of your business!

OpenERP/Odoo allows you to customise the user interface and manage your business processes in only a few clicks!

Manage your sales funnel with no effort. Attract leads, follow-up on phone calls and meetings. Analyse the quality of your leads to make informed decisions and save time by integrating emails from all your contacts directly into the application.

Track your opportunities pipeline with the revolutionary kanban view in a few simple steps. Work inside your sales funnel and get instant visual information about next actions, new messages, top opportunities and expected revenues.

Bring social intelligence to your sales process. Gain insights from social media sites such as LinkedIn, Twitter or Facebook to find prospects easily and automatically load their contact data into your address book.

Automatically create leads from incoming emails. Analyse leads efficiently and compare performance by campaign, department, channel or sales team. Find duplicates, merge leads and assign them to the right salesperson in one operation. Spend less time on administration and more time on qualifying leads.

Organize your opportunities so you can stay focused on the best deals. Manage all customer interactions from the opportunity like emails, phone calls, internal notes, meetings and quotations. Follow opportunities that interest you and be notified about specific events: deal won or lost, stage changed, new customer demand, etc.

Work with the email applications you already use every day. Whether your company uses Microsoft Outlook or Gmail, no one needs to change the way they work, so everyone stays productive. Route, sort and filter incoming emails automatically. Odoo CRM handles incoming emails and routes them to the right opportunities or sales team. New leads are created on the fly and interested salespeople are notified automatically.

Schedule your meetings and phone calls using the integrated calendar. You can see your agenda and your colleagues' agenda in one view. As a manager, it's easy to see what your team is currently working on and to set up a timeline for certain tasks.

Use OpenERP/Odoo marketing campaigns to automate lead acquisition, follow ups and promotions. Define automated actions (e.g. ask a salesperson to call, send an email, set up a reminder, etc.) based on triggers (no activity for 20 days, answered a promotional email, etc.) Optimize campaigns from lead to close, on every channel. Make smarter decisions about where to invest and show the impact of your marketing activities on your company's bottom line.

Service Description:

Customise your sales cycle by configuring sales stages that perfectly fit your sales approach. The system allows you to create your own templates for the stages. Control statistics to get accurate forecasts to improve your sales performance at every stage of your customer relationship.

Get the insights you need to make smarter decisions. Design custom dashboards to get a picture of your business at a glance. Dig deeper with real-time reports and flow charts that anyone can create and share.

Reinforce good habits and improve win rates with real-time recognition and rewards inspired by game mechanics. Align sales teams around clear business objectives with challenges, personal objectives and team leader boards. Promote leaders and competition with sales teams with performance ratios. Assign clear goals to users to align them with the company objectives. Compare revenues with forecasts and budgets in real time.

Manage your customers after-sales experience with helpdesk, claims management, resolutions management etc.

Build and grow your OpenERP Odoo CRM with our Odoo Apps

Website Builder

Get an awesome enterprise website. Fully customizable and SEO friendly.

e-Commerce

Boost your online sales with sleek product pages.

Blogs

Attract more leads with a winning content marketing strategy.

CRM

Boost sales productivity, improve win rates, grow revenues.

Quote Builder

Create polished, professional proposals in minutes and let customers sign online.

Point of Sale

Touchscreen point of sale based on iPad or Android tablets.

Project Management

Enable your project right way Step by step get work done.

Billing

Manage contracts, create recurring invoices, bill timesheets, get paid faster.

Accounting

Integrate book keeping with all your operations to keep accurate informations.

Warehouse Management

A revolutionary double-entry inventory management system.

Manufacturing

Manage, plan, track and schedule all your manufacturing operations.

Purchase

Get the best from your supply chain. Improve your inventory performance.

Mailing

Design efficient emails campaigns Send, convert and track your success.

Live Chat

Engage directly with your website visitors to attract leads and boost online sales.

Survey

Raise high quality insights through surveys, a great way to engage with prospects.

AdWords Optimizer

Google AdWords optimization algorithms. Get 40% more from your AdWords budget.

Events

Create sleek and attractive event pages. Sell online and organize on site.

Community Builder

Build and engage with communities with forums, Q & A, mailing lists.

Lead Automation

Design campaigns, refine segmentation, automate actions and track performance.

Employees

Oversee your employees directory Retain significant informations about your team.

Enterprise Social Network

Start the dialogue and share knowledge Informations collection made easy

Recruitment

Streamline Your Recruitment Process Index resumes, track applicants, search profiles

Expenses

Have an overview of your employees expenses Access an accurate tracking tool

Service Description:

Appraisal

Employees development follow-up
Set-up appraisals and watch your employees evolution

API

Connect Odoo to external applications through JSON-RPC or XML-RPC.

Discuss

Organize groups of discussions and communicate efficiently on all resources.

Fleet

Fleet management at its top
Take care of all actions regarding your fleet

Instant Messaging

Chat in real time with your colleagues, share screens and talk online.

Notes

Personal to-do lists that works.
Share and collaborate on meeting minutes.

Business Intelligence

Design your dashboards, setup KPIS, slice and dice on your cubes.

Gamification

Boost engagement, promote smart objectives, reward and challenge your teams.

Odoo has more than 3,000 open source business apps.

Affinity and OpenERP/Odoo CRM

Affinity offers consultancy, configuration, implementation, custom module development, hosting and support services to help your organisation make the most out of its OpenERP/Odoo CRM implementation. Our services for OpenERP/Odoo CRM family of products include:

OpenERP/Odoo CRM as a service: Affinity can help you move to the Cloud! With our OpenERP/Odoo CRM as a service offering, you need not worry about application infrastructure, upgrades, skills or even hardware! You can simply subscribe to our service and access it over the Internet using your browser while we ensure it is backed up, maintained, upgraded and available 24x7!

Consulting: Affinity can help you take your first steps towards an OpenERP/Odoo CRM implementation. From ROI studies, cost benefit analysis, requirements gather to business architecture and IT architecture, Affinity can help you all the way to ensure a smooth implementation.

Configuration, development and implementation: Affinity can help you achieve cost effective solutions to meet and even exceed your CRM requirements. Affinity can help you identify, configure and enhance existing modules. Where requirements cannot be met with existing modules, Affinity can develop custom modules and help plan your implementation with minimal impact on your business.

Support and maintenance: Affinity can help you not only with the ongoing maintenance of your existing OpenERP/Odoo CRM implementation, but can also assist you in getting most out of your investment. Our highly experienced resources have all the tools and knowledge to analyse your environment and suggest enhancements, changes and tweaks to optimise your existing implementation.

Migration: Affinity can help you migrate from legacy systems and other CRM systems to OpenERP/Odoo CRM.

The same version of OpenERP/Odoo CRM can be used either on-site or online. At Affinity, we are committed to open source philosophies and give the freedom of choice to our customers helping you decide what is best for you.

Affinity:

Affinity has been successfully operating since it was founded in January 2004 (winning best new business of the year at the 2005 CBAs and numerous awards since). It has recently achieved significant organic growth (despite the current global market difficulties) with sales revenue increasing year-on-year and into the current financial year - cementing its strong financial standing. The company remains independently-owned with a strong balance sheet and order book.

Putting the customer first is at the core of what we do. Only if the customer is satisfied will we have achieved the right result. And it is only through creativity and innovation that customer satisfaction can be ensured.

Meeting the needs and demands of the customer always, in our experience, involves going the extra mile – finding often unexpected solutions to emerging requirements and challenges

Affinity's Processes:

Affinity Project Management

Affinity is in an excellent position with its multiple methodology offerings. We recognise that there is not a “one shoe fits all” approach to delivering successful projects and have developed and matured our own processes to match the differing needs of our diverse client base.

Our mainstay method utilises a core iterative development team following tried and tested Scrum agile principles. We have tailored the entry points to this core competency to enable us to support everything from formal “waterfall” engagements to “full agile” projects and most things in-between.

Ultimately we have modelled our approach to suit the needs of our clients rather than dictating one specific engagement process; we can fit in where you need us and deliver in a way that gives you the most benefit. As a key to this, early in any engagement we help our customers understand their own strengths and competencies in project processes and produce an offering that dovetails into a customers’ organisation rather than being at odds with it.



Affinity Waterfall

Many of our clients are seeking a traditional waterfall engagement and we equally welcome that approach. If there are no significant uncertainties in your own requirements, we will work with you in an elaboration phase to formally detail them together. Once defined, we will happily deliver against a set budget and specification. We add some further value to this approach by vertically or functionally dividing up your requirement in-house and iteratively developing it within our Core team. This means that change control can be managed better (and minimised) should your documented vision change or something unexpected happens.

Affinity Agile Hybrid

We are realists – we know that a full Agile engagement across company boundaries is hard to achieve and also in an uncertain world that Waterfall requirements can and do change. Unless an organisation has reached a reasonable level of Agile ‘maturity’ it may actually be culturally or organisationally impossible for them to work in a fully Agile way. We can solve this and we will do this in two ways:

1. An ‘out of the box’ approach to technology.

We will select and propose suitable open source packages, modules and templates that we believe can cleanly offer the solution that you are seeking ‘out of the box’ without the need for fundamental code writes at a low level. We promote taking this more straightforward approach to technology choice so that we can deliver you business value as soon as possible rather than building something from scratch.

Any package solution will require levels of configuration and customisation, however if the underlying business processes that they offer do indeed deliver your needs, then there is no need to re-specify those processes in agile story cards, and carry out a detailed business process mapping before we can start delivery.

2. A lightweight Agile backlog

Tied neatly to the above, we will embed our own agile expertise into your project and guide some of the Analyst and Product Owner activities particularly in the early iterations. Most importantly as we will have proposed technologies that minimise the need for the detailed requirements work that consumes a lot of time, you will be able to step back a little from the daily refinement and story breakdown work that would be present in a typical Full Agile engagement and predominantly focus on acceptance of the project deliverables at the end of each iteration.

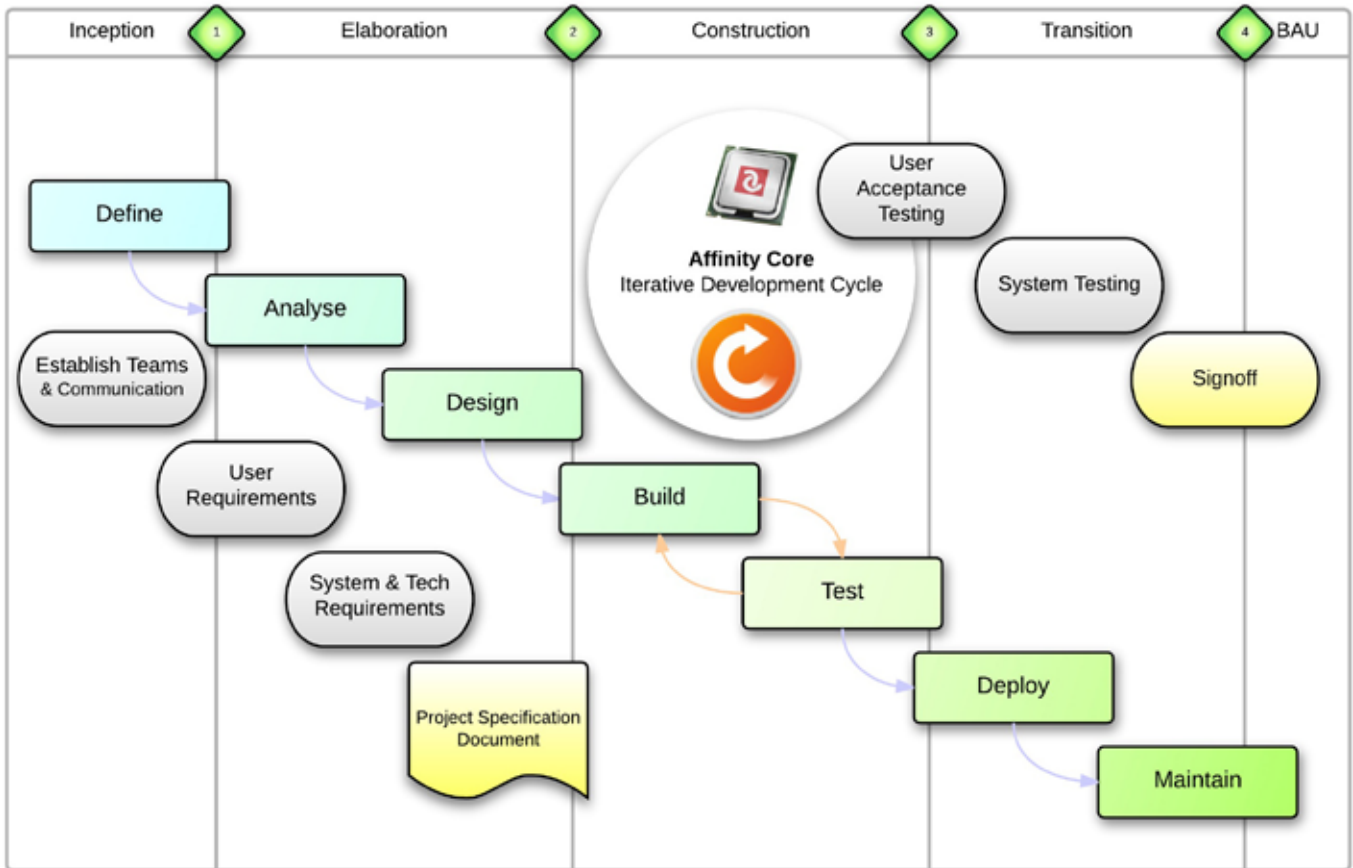
Affinity Agile

Our full Agile project process works on an iterative backlog definition and refinement cycle that feeds into our core development scrum process. This is an industry standard approach and as well as operating perfectly on its own, can also plug into large-scale Agile programme methods such as the Scaled Agile Framework (SAFe).

This highly collaborative approach puts your project at the heart of our company and delivers a cohesive end to end process from your Project Roadmap, Product Owners and Analysts downwards. We will justifiably have high expectations of your consistent daily engagement with us in stand-ups, refinement sessions and story-card workshops to make your project a success.

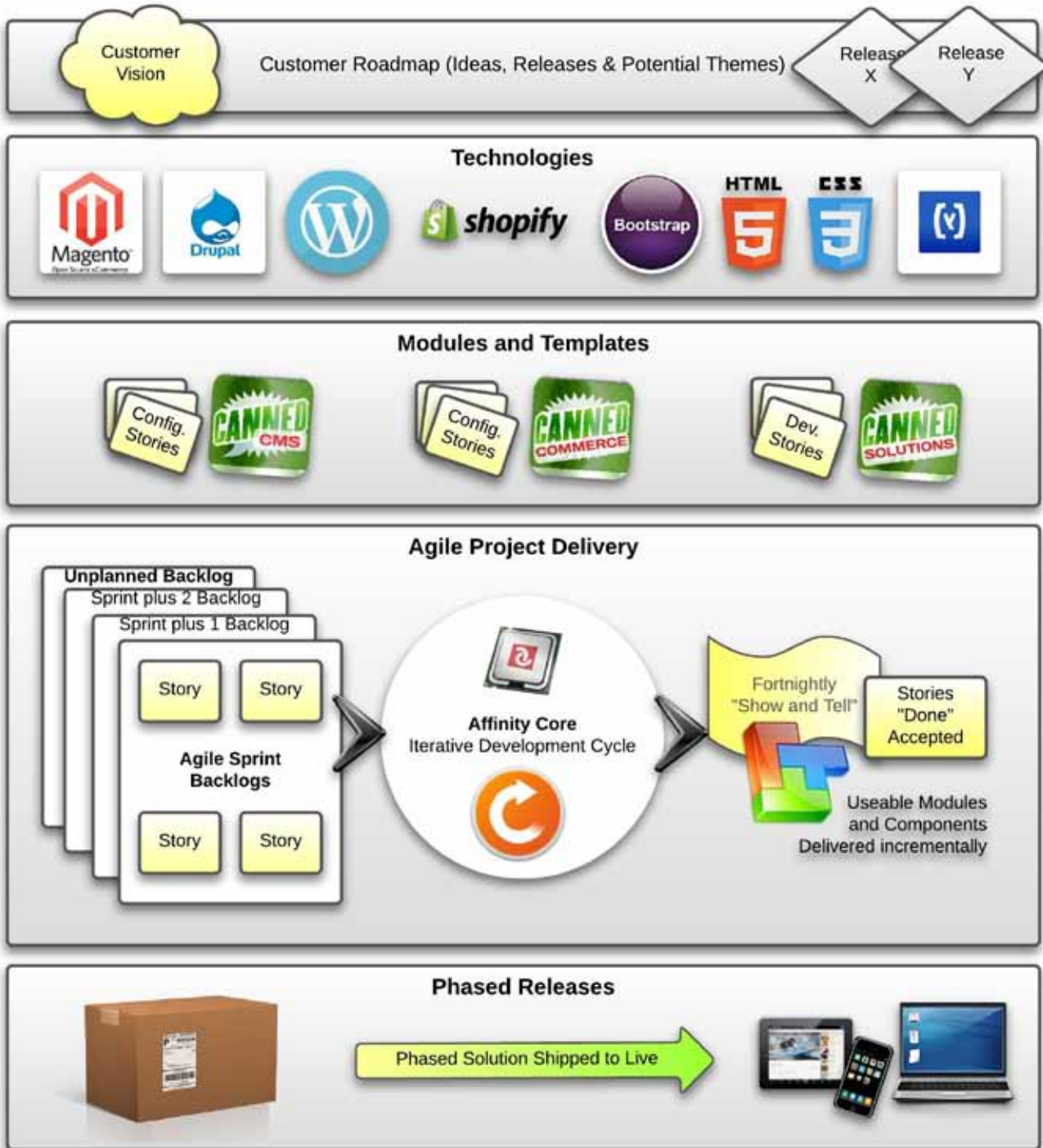
Affinity Agile

For a full definition of Affinity's Waterfall approach go to: www.affinity-digital.com/waterfall



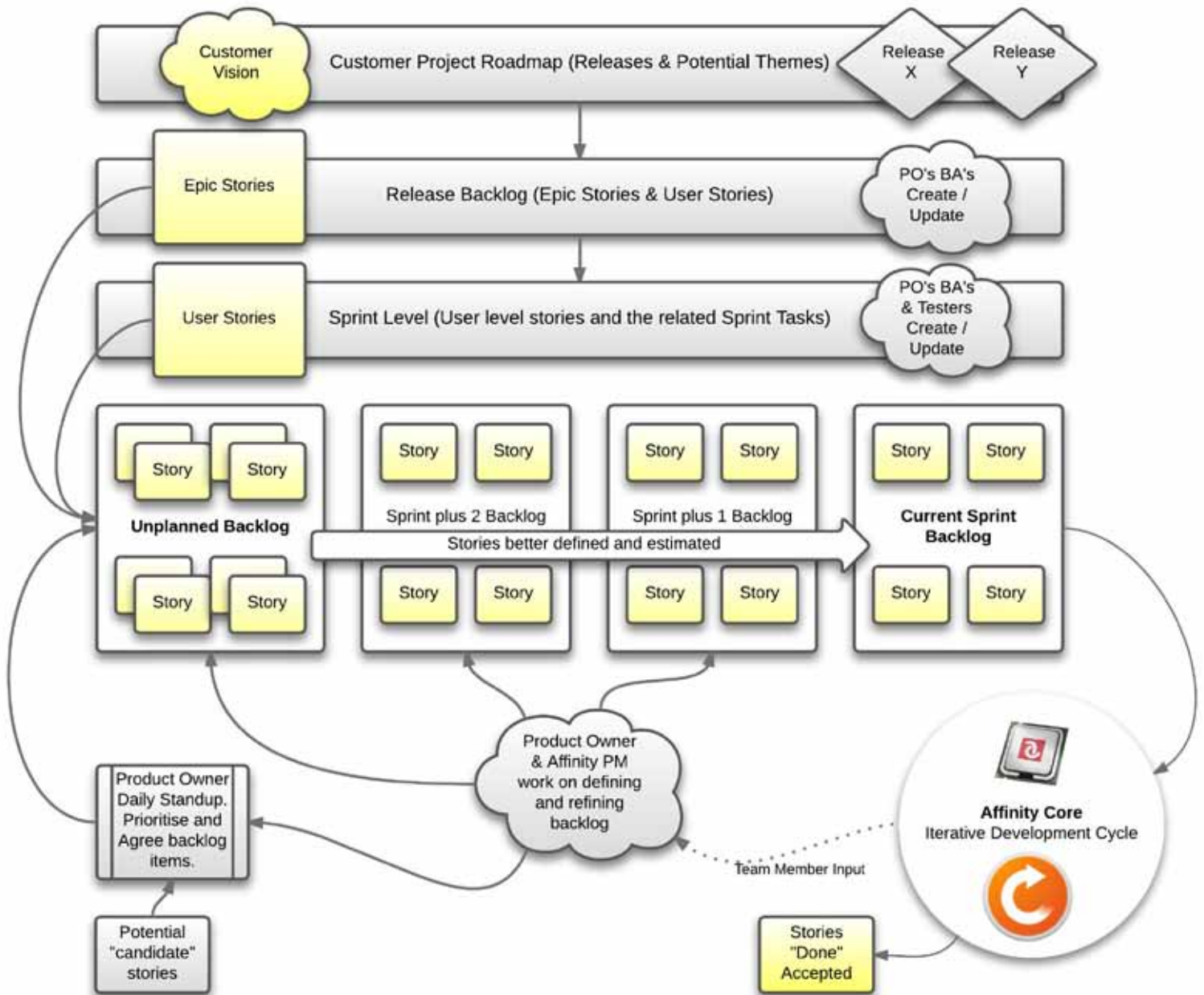
Affinity Hybrid Agile

For a full definition of The Affinity Hybrid Agile approach go to: www.affinity-digital.com/Hybridagile



Affinity Full Agile

For a full definition of The Full Agile Requirements Backlog go to: www.affinity-digital.com/agile



"Affinity does, from time to time, use freelance (contract) staff on our projects if the scale demands it. These freelance staff are well known to us and are well versed in our processes and procedures."

Who we do it for:

We work with a range of clients using the Open Source platform OpenERP Odoo, via Extranet and Intranet portals, ranging from Government contracts to smaller solutions for SME's. This is one of the key benefits of OpenERP Odoo – Its flexibility and scalability.

Clients and solutions of note include:

Client: Cornwall Mobility Centre CMC

Profile: UK based Motoring Disability Assessment Centre

Projects: Web Browser based Enterprise Resource Planning -

Platform: openERP (now called odoo)

Sector: Disability

Applications: Website CRM - ERP

Client: The Mobility Forum

Profile: Network of 18 UK based Motoring Disability Assessment Centres

Projects: Multiple installations of Web Browser based Enterprise Resource Planning systems with individual configurations

Platform: openERP (now called odoo)

Sector: Disability

Applications: Website CRM - ERP

CASE STUDY: Please go to www.affinity-digital.com/casestudy/cmc

Affinity's Associated Services:

Business Analysis

One of the most critical components of the affinity team are the web business analysts. Without this crucial role, our Developers and Project managers will be unable to effectively complete their tasks. A web business analyst identifies the needs within an organization that correspond to the sphere of the online world. They are also charged with determining an appropriate course of action or solution depending on needs of the company. "Web Business Analysts are essential to linking the business objectives and the technical capabilities," Our clients want to achieve their goals, but they may not understand the technical limitations in what can be done, in terms of resources, technology, and the time available. Our web business analysts are the link that gives better understanding to both sides.

Creative Design Services

We believe that good design is fundamental to any successful project. Making good use of graphic design principles allows us to:

- Create attractive and engaging solutions for our clients;
- Maximise ease of use and facilitate the users' journey through any website or application;
- Enhance and drive forward the client's digital brand in support of their wider marketing strategies.

We focus on the usability of your website, making sure that your customers' interactions with it is enjoyable and without confusing or superfluous obstacles that may cause them to disengage or abandon their journey. By applying these principles to your website, we will be able to deliver against your requirements in a way which will not just enhance your visitors' experience but will also strengthen your brand in support of your wider marketing strategies.

Our design team are fully conversant with the implications of developing a truly fully responsive in design, meaning that whatever platform (screen size and resolution) the website is viewed on. the web page is optimized to deliver the best and most appropriate view of that page. The beauty of 'open source' software and Drupal in particular is that we can demonstrate this technological approach and many of its other features on a 'play before you pay' basis).

Use Cases

Well-written use case narratives (or simply "use cases") offer affinity's analysis, development, and testing teams an invaluable guidebook. A use case is a formalized story that describes how someone procedurally interacts with an existing or proposed system and they should be part of every project managers' permanent tool set. Well-written use case narratives (or simply "use cases") offer the analysis, development, and testing teams an invaluable guidebook. A use case is a formalized story that describes how someone procedurally interacts with an existing or proposed system and they should be part of every project managers' permanent tool set.

User Journeys

At affinity we ensure we understand the underlying problem before attempting to solve it and then make things simple and intuitive. Acknowledging that the user is not like you and having empathy is the key to a great User Journey. When we really get what makes people tick and why they do what they do, we'll have a much easier time making their visit better.

Affinity's Associated Services:

User Experience Design

When someone is trying to get something done, they're on a mission. Don't interrupt them unnecessarily, don't set up obstacles for them to overcome, just pave the road for an easy ride. Affinity's UX team will create designs that have intentional and obvious paths that will allow people to complete tasks quickly and freely. We will create a visual hierarchy that matches the user's needs, Provide signposts and cues and of course make actions reversible. Our mantra is - Less is more. It is important to make sure that everything in the design has a purpose. Some things are purely functional; other things are purely aesthetic. But if they aren't adding to the overall positivity of the experience, then we'll take it out. Finally be consistent Navigational mechanisms, organizational structure and metaphors used throughout the design must be predictable and reliable. When things don't match up between multiple areas, the experience can feel disjointed, confusing and uncomfortable. People will start to question whether they're misunderstanding the intended meaning or if they missed a key cue. Consistency implies stability, and people always want to feel like they're in good hands.

Other Affinity service offerings:

Open Source Website Consultancy

Drupal Development

Wordpress Development

Magento Development

ERP - Implementation

Open Source software Development

Software Integration Specialists

Open Source Flexible Assessment Systems (FAS)

Making Contact:

Please call Jonathan Duval on:

Tel: 01872 321177

Mob: 07739 362472

email: jonathan.duval@affinity-Digital.com