

If you can't relate to why GEM's new features represent a quantum jump in computer software, consider just some of the problems with all current generations of computer software – **not just Contact Management or CRM systems, but ALL computer systems.**

## Different databases for different purposes

Often different people in the same organisation have their own list of contacts that is separate from the company database. This means that if they update their own list they have to take special action to update the company's data. More often than not this does not occur. So special exercises need to be conducted from time to time to ensure the company data does not get too far out of date.

Organisations too, often have lists and databases for different purposes; one for Customers, another for Suppliers, one for Shareholders, another for Staff, one for Contractors, another for people involved with various projects... The lists just go on and on. Even so-called integrated systems will often have different master files for each. But what happens if a Shareholder or member of Staff is also a Customer, or a Customer is also a Supplier? Obviously they would have to appear in multiple lists. But then what happens if someone's details change? **You** have to remember which lists they are in and make sure they are all updated correctly!

For example, Joe Smith, a supplier of 'Acme Ltd', advises that his firm's contact details have changed. This is recorded in the database which keeps all the information pertaining to suppliers at Acme Ltd. However, an employee in Acme Ltd's purchasing department didn't realise that Joe is also a good customer. Consequently, the contact details in the marketing department's system were not altered. A few months later Joe is annoyed to find that he has missed a special customer event, as the invitation was sent to the wrong address. What is worse, 'Acme Ltd' has been sending correspondence to Joe at his new address for months now – but only in his capacity as a supplier. Indeed we have all got used to this sort of problem with computer systems that we can all quote many personal examples. We even shrug them off with "That's the problem with computers."

GEM resolves all these issues by having a single database that everyone can share, even when they are out of the office, which records everyone's details only once and records all your relationships with them.

## Can't record Relationships

Almost no computer system today enables you to record ALL the relationships between EVERYONE in the system, whilst having only one record for everyone you deal with. GEM does. Why is this important? Consider the example above. Suppose Joe is the Manager of one of your small suppliers. He might also be the Director of one of your major customers. If your purchasing department annoys him, it could have major repercussions in your own cash flow! Even if existing systems can record the people associated with your Customers and Suppliers, will they 'know' that the 'Joe Smith' on one list is the same 'Joe Smith' on the other list? Can you look at one record for 'Joe Smith' and see all his relationships? No you can't! (GEM even keeps track of the firms his Wife, Parents or other relatives are involved with.)

Knowing someone's relationships can also be useful if you are trying to find someone in your database:

- Suppose you can't remember someone's name but you can remember that they are someone else's sister. In a conventional system, *or even the phone book*, you would not be able to find them - particularly if they were married. With GEM you can.
- Again, suppose you can't remember the name of a subsidiary company you want to find. In most systems you would be sunk. GEM automatically creates Organisational structures for you when you input an Organisation's parent organisation. This enables you to simply display the whole group for the organization whose name you can remember and the staff lists for each organisation in the group.
- So often it's the relationship that we can remember, not the name - a Supplier's Solicitor, or a Customer's Advertising Agency for example.
- Often, you wonder why someone is in your database - if you know their relationship to someone else, the answer is often self-evident. If you don't know why they are there, you could decide to delete them.

## Lack of Consolidated History

Most Organisations today record different types of communication in different systems – one for emails, another for faxes and Letters. And what about phone calls? Do you even bother to write a note? What about the work you do for your clients, where does that get recorded?

When you reply to someone by E-mail, it builds up a history of who said what to whom and when entirely automatically. Well, GEM does exactly the same thing but includes Phone Calls, Faxes, Letters, Meetings, Thoughts and Inspirations as well, (or anything else you want) - all merged into a single consolidated history. These histories can then be viewed by Subject from the point of view of any Organisation or Person involved in the correspondence - even if the people involved leave their original employer and go to work for someone else.

Most CRM systems merely make a note of a communication under the name of the person contacted. If that person leaves their employer and you delete their record, all the notes you have made disappear too! They do not allow you to see your dealings with a staff member an Organisation who is not on the current staff list. Nor can you see your dealings with someone when they were working for previous employers – as you can in GEM. GEM also has an in-built Project Management and Client Billing Module that allows you to record the work you do either on Timesheets or Job Cards. The system will then produce Client Charge Sheets for billing purposes.

GEM also ensures it is the easiest possible way of making Phone Calls, sending E-mails, Faxes and Letters. So people want to use the system because it makes their life easier. By capturing a record of what they do in the process, your system will be kept perpetually up to date.

## Duplication – the biggest problem with every computer system today

**Not just CRM systems, but almost EVERY SYSTEM available today** merrily duplicates things like shared address and phone number details between different people's records. This means that **you**, rather than the system, have to remember whether there are other records that have to be changed when one of them changes. When most existing systems were developed the technology simply did not exist to allow their designers to do other than duplicate data between records – if they wanted to retrieve it in a timely manner.

Unfortunately this was always their 'Achilles Heel' as the User had to know which data had been duplicated and change it themselves. This is impossible if multiple people are updating the same database. It is also impractical for a large database, even with a single user – unless you've got a mind like an elephant. (And if you've got a mind like an elephant why do you need a database?)

Recent advances have meant this is no-longer a constraint. GEM now leapfrogs all earlier technology. Take, for example, how systems would find someone's Work Phone Number. In a conventional system this information would be in the Person's record – so there is nothing else to do. Unfortunately if you know someone else who works for the same employer, the same work number would be in their record too. If you need to change one of them, **you** have to remember to change the other - because the system does not do it for you.

GEM however stores the employer's phone number only once. It also remembers that both employees work for the same employer and therefore share the same work phone number. So, changing one person's work phone number automatically changes the work phone number of all other employees. (This does not apply to direct-dial or mobile numbers.) This means GEM does more work than most existing systems. However, who would you rather did all the work – **you** or your computer system? In a conventional system you have to remember who else is affected. GEM effectively remembers it for you – so **you** don't need to.

If you give someone an Address that GEM recognises from its Phone Number, then GEM will immediately know who they live with. This is a great way of checking that someone is not already in the system. Any subsequent changes made to their Address or home phone number will apply to everyone at the same address. (If someone leaves home, it's easy; you do what has happened in the real-world. You remove them from their old Address and give them a new Address.)

Not duplicating data is particularly important in a multi-user system, as you personally may not have put the original data in, in the first place. So how are **you** expected to remember it? The answer is of course, you can't. What happens is you end up with differences in data between records that should actually be the same. Then of course you lose confidence in your system because you don't know who's data is correct.

## Systems that use 'Groups'

Some systems, realising the short-comings of the traditional approach, have recently retro-fitted them to enable you to create 'groups' of records, so that if one of them changes, the system will remind you to change the others too. This sounds OK, but it still means that you have to remember when adding new records to the system that there are other records with which they may have to be grouped. The onus is still on you! The grouping is not done for you! The timing of when you have to remember has merely changed - from when a change is made to the data, to when a new record is added. The problem is, if someone else input the data, how are you supposed to know it's even there?

GEM on the other hand recognises shared Addresses for you. So you don't need to create artificial 'groups' of records - or remember you have done so.

## Data Import Routines

Most other systems have data import routines that are designed to do a one-off data import from a particular system. They strike can problems however in re-importing from the same data-source to do an update, and will almost certainly strike problems if they attempt to import data from multiple data sources that contain information about the same Organisations or People - as this would duplicate them in your database.

GEM has its own data import routines that enable you to extract data from almost any existing system. You can also obtain data from any specialist 'Data Provider', screen-scrape it from websites or even scan business cards. GEM does not care how you get it. Its data import routines will allow you to import data and update it from as many data sources as you like. Whilst importing data it has the necessary complex logic to check whether someone is already in the system. If they are, their record will be updated rather than duplicated.

## **Synchronisation**

GEM's next release, due shortly, will feature OUTLOOK Synchronisation. This will ensure that the Contact data in your copy of OUTLOOK is exactly the same as in GEM. Since OUTLOOK can be synchronised with mobile phones, PDA's and many other systems, any change that you make anywhere else will find its way into GEM and vice-versa. Not only that, but since GEM knows who else is affected by any change, GEM will generate updates for everyone else affected that will propagate themselves throughout all your systems.