

APPENDIX B: TERMINOLOGY LIST

This appendix contains the terminology list for the Relationship Management application area.

activity

A larger task that is made up of a sequence of to-dos.

The to-dos within an activity are all linked to each other by a date formula and are assigned to the responsible salesperson.

business relation

The mode or kind of professional connection between your company and the company you interact with.

campaign

All the actions (and interactions) taken in order to reach specific marketing or sales goals.

campaign entry

The record of one interaction with a contact or a group of contacts that is made as part of a campaign.

company

An entity that interacts with your company, for example, a customer, vendor, bank, law firm, or consultancy.

contact

A company or a person that has relations with your company's environment.

cover sheet

A letter that accompanies another letter or package addressed to a contact.

industry group

A group of companies that produce or supply the same or similar products or service.

interaction

The communication between your company and a contact, for example, by letter, fax, e-mail, telephone, or meeting.

interaction group

A group of interactions that have the same characteristics.

interaction log

A record of all the interactions (for example, phone calls and letters) relating to a particular contact, salesperson, campaign, and/or to-do.

interaction template

A model defining the basic characteristics of an interaction that can be used as a basis to create new interactions.

mailing group

A group of contacts (companies or persons) to whom you send the same information or message.

opportunity

A possibility for a salesperson to sell to a contact.

profile

A list of the most noteworthy characteristics of a contact. Profiles are mainly used to segment contacts and deal with them in a personalized way.

reduce

To remove contacts from a segment by defining the part that you want to take away from the segment.

refine

To remove contacts from a segment by defining the part that you want to keep in the segment.

sales cycle

A sequence of stages that a salesperson can define and/or select according to the type of sales opportunity and that they can use to manage the sales process.

segment

A group of contacts selected according to certain characteristics.

to-do

A specific task assigned to a salesperson or team that is directed at a contact or segment and/or is part of a campaign.