

SIMPLEVIEW CRM

# One system – maximum productivity.

More destinations worldwide use Simpleview CRM as their primary information management system than any other platform. Find out why.

LET'S TALK

## Your CRM solution is simple. **It's Simpleview.**

Built by the industry for the industry, Simpleview CRM lets you manage all aspects of your destinations or destination organizations in one convenient place. From partner relationships to marketing automation, from meetings and event sales management to collaborating across departments, Simpleview CRM is intuitive and easy to use.



### **Members & partners**

Strengthen relationships with key stakeholders and show your value



### **Group sales**

Manage the entire sales and services lifecycle for meetings, sports, travel trade, and other group business



### **Leisure travel**

Capture traveler information and target your marketing efforts



### **Marketing & media relations**

Organize Fam Trips, manage campaigns, and report media exposure

Simpleview CRM integrates with your favorite products.

- Cvent
- Act-On
- Meetingmax
- Intuit QuickBooks
- MINT+
- Event Impact Calculator
- Outlook
- Gmail
- Eventsforce
- SendSites
- ICCA database

**Seamless integration** — work faster and smarter

- Ditch the old databases and get all the features you need in one location. **From marketing automation to event management, from business intelligence to CMS integration**
- **Access it anywhere.** It's cloud-based & configured to fit your needs
- **Streamline work** with members/partners, meeting planners, tour operators, the media, and other key contacts
- **Seamlessly integrate 20+ third-party integrations and 12 Simpleview suite integrations** to manage everything in one place



We went through the RFP process, and Simpleview clearly rose to the top. We were impressed by the website designs, the CRM capability, and how we could house everything in one place. We wanted to streamline the processes within our office to be more efficient, more productive, and to get better member engagements. This was an opportunity to do all of those things.”



— TONY CAMERON | CEO  
Tourism Maine Association

## Simpleview CRM Modules

### Member/partner management

Capture and manage all listing descriptions, amenity and meeting facility specifications, images, and logos. Track and report all member communications and engagement. Manage member dues, sponsorships/advertising, and invoicing. Automatically track and report the value your DMO is generating for members.

### Member/partner extranet portal

Designated member contacts can access their accounts via a secure online portal. Members can access various functions depending on permissions you grant, including account/contact record updates, lead retrieval/responses, reports, bulletins, dues payment, and more.

## **Group sales**

Streamline the sales and services process for meetings, conventions, exhibitions, and sports. Manage every aspect of your sales operations, including client relations, prospecting, lead generation and distribution, workflow management, bid preparation, event servicing, economic impact reporting, and more. Online lead distribution and response collection through a secure member portal. Automated reporting, sales forecasting, and dashboards. Import profiles from the MINT+ and ICCA databases.

## **Client services**

The client services components are incorporated into the group sales module (and integrated with other modules in the system). A service lead can be associated with a meeting lead/booking, Fam Trip, site inspection, or other event, incentive group, or stand-alone. Client services components also include creating referral lists, tracking expenses/in-kind, commitments, functions, and more.

## **Familiarization/site visit management module**

This module allows for the management of all familiarization trip and site visit itinerary details and integrates with the other modules in the system (e.g., link the event to partner participants and meeting planner attendees).functions, and more.

## **Media & public relations**

Manage records for media outlets and contacts, track media coverage of your destination and members, distribute media leads, and manage familiarization tour participation. Report media exposure generated for your destination and members.

## **Co-op marketing & advertising module**

Manage campaigns and promotions, co-op programs, print guide ad sales, and more. Allow partners to register and pay for these programs using the Marketplace functionality within the Partner Extranet Portal and members.

## **Report builder**

Simpleview CRM includes a Report Builder allows designated users to create Custom Reports. The Report Builder is available within all modules throughout the system. Virtually every field in CRM can be queried and/or displayed on reports.

## **Event management module**

This module manages all industry partner events, seminars, tradeshow participation, sales missions, and the details for each. It is integrated with the other modules in the system (e.g., partner contacts can be invited to participate in events) and allows for online registration and secure payment via our Eventsforce integration.

## **Tour/travel trade sales**

The Tour/Travel Trade module is similar in structure to the group sales module, but configured for the tour, travel and incentive sales teams.

## **Inventory management module**

This module allows DMOs to manage brochures and other collateral inventories, client gifts, supplies, promotional items, etc. Inventory can be tracked at multiple locations, and the system notifies designated staff when inventory falls below an established threshold for any item to schedule a reorder.

## **Visitor services/consumer module**

This module tracks visitor inquiries and consumer records from all sources – website forms, phone, walk-in, reader-response, consumer shows, etc. Fulfill brochure requests, manage newsletter subscriber lists, direct mail lists, profile/segment/target your visitors, etc.





## Form builder

Using our Form Builder tool, along with the Simpleview CRM Forms API (see additional electives for consideration), web forms can be built within the CRM and displayed on the third-party website for data collection, such as newsletter signups and visitor guide requests. The data captured by these forms will be inserted directly into CRM.

## Outlook/Gmail integration

Integrating with the world's most popular email clients ensures that important communication histories are stored within the CRM system without the need to copy and paste manually. Emails sent or received in Outlook or Gmail can be synchronized with the corresponding contact record in the CRM system with the click of a button. This integration records emails from Outlook or Gmail as traces, including the entire email thread and .msg file attachment.

## ICCA database import tool

The ICCA import tool lets users easily import client and profile/series data from the International Congress and Convention Association's database. Further integration with ICCA is under development.



## Simpleview CRM: Elective Modules and Add-Ons

The following modules and integrations are available on an elective basis:

### APIs for member listings

Member website listing content (business information, descriptions, amenities/facilities, photos, logos, offers, etc.) is stored within Simpleview CRM and available for publication on the bureau website (or apps, kiosks, etc.) via the API.

### Member Twitter mentions tracking

This add-on allows for tracking and reporting of member Twitter exposure. If your bureau tweets about a member (or retweets a member's tweet), the CRM system will capture the tweet within the member's CRM account record and track the total number of followers and tweet reach – allowing you to report the exposure generated on behalf of the member.

### Act-On marketing automation suite & CRM integration

Marketing automation enables DMOs to automate email communications and key processes for better lead nurturing, lead scoring, targeted messaging and social engagement. With Act-On, DMOs can drive better business outcomes and see higher customer lifetime value. Act-On's expansive tool suite helps DMOs of all sizes orchestrate coordinated marketing programs to deliver more qualified sales leads, personalize and automate messaging to customers, optimize resources and improve results.

## Destinations International Event Impact Calculator integration

The Event Impact Calculator was developed by Destinations International and Tourism Economics (an Oxford Economics company) to provide a standardized approach to calculating the economic impact of meetings, festivals, and sports events. The Simpleview CRM integration with the Destinations International calculators allows for real-time calculations and detailed reports (direct/indirect spending, tax generation, jobs support, ROI, etc.) within Simpleview CRM.

## SendSites & CRM integration

SendSites is an online proposal generator that allows DMOs to quickly create and send engaging, interactive, and branded digital proposals. A key integration is the Room Block feature, which provides the ability to import bid responses associated with a Simpleview CRM lead into your proposal.

## Eventsforce + CRM integration

The Eventsforce + CRM integration enables users to power their events with attendee information from Simpleview CRM while leveraging Eventsforce's robust event management and registration capabilities.

## Cvent integration

The Simpleview CRM/Cvent integration provides real-time sync capabilities that will allow your bureau to quickly bring Cvent RFPs into your Simpleview CRM and provide suppliers with a single place to submit responses. Hotel/venue responses in Cvent will automatically feed into Simpleview CRM for synced RFPs, significantly reducing the duplication of effort and data entry requirements.

## MINT+

The Meetings Information Network (MINT+) database helps destinations prospect intelligently by using both historical data and information on future bookings. A joint venture between Destinations International and Simpleview, MINT+ is the DMO industry's exclusive data cooperative.

TORONTO.

Visit  
tucson

VISIT  
LIVERPOOL

LAS  
Vegas

Built for the industry, **by the industry.**

Simpleview is a leading provider of CRM, CMS, website design, digital marketing services, and data insights for tourism boards, convention bureaus, destination marketing and management organizations (DMOs), venues and attractions. The company employs staff across the globe, serving clients of all sizes, including small towns, world capitals, top meeting destinations, and countries across multiple continents.

**Make the most of every opportunity for your destination with Simpleview CRM.**

LET'S TALK

+1 520.575.1151  
[SIMPLEVIEWINC.COM](https://simpleviewinc.com)

simpleview 