

Cantata Vantage – Product summary

About Cantata

Cantata is the UK's leading independent CRM specialist, helping organisations get the most from customer and stakeholder management. We are entirely independent of all CRM providers (and those from related technologies such as workflow, document management, knowledge management, email management and CTI). This means we can offer best in class advice. Our output ranges from initial strategy and business case development through to implementation and training. In particular, we specialise in the use of the new breed of commoditised, highly cost-effective CRM solutions (such as Dynamics CRM and salesforce.com) and provide extensive collateral and “out of box” tools to reduce project timescales, cost and risk.

We use our expertise to work with organisations to resolve business issues in areas such as contact management, case management, campaigns, knowledge management and process automation. We work with some of the best known names in the UK. Our particular focus is on Financial Services, Regulators, Membership Organisations, Energy and Utilities and Commercial Enterprises.

We provide a breadth of skills to cover the whole range of requirements of a CRM implementation with a team who specialise in everything from initial strategy and business case development, requirements analysis and business process work, implementation, rollout, training and ongoing support. Our specialist CRM business consultants all have years of directly relevant experience and specialize in ensuring CRM projects are pragmatic, realistic and effectively scoped and delivered.

Cantata Vantage

Over the last 5 years we have developed a real depth of insight into the CRM needs of our financial services, regulatory, membership and energy/utility clients. Many of them asked us to develop our own solution in order to benefit from our experience and to avoid having to re-create core modules of functionality which are deployed in most implementations.

The result is Cantata Vantage, supported on both Microsoft Dynamics and Salesforce.com platforms. Using our experience we are able to use Cantata Vantage to provide at least 80% of your needs, out of the box. When allied to our strawman-based requirements phase and our implementation capabilities, a Cantata Vantage project can be completed in as little as a month. For maximum flexibility, we offer both hosted (private cloud is most common here) or on-premise solutions. Allied to our methodology for the rapid delivery of specific additional configuration, data migration, deployment and training, it delivers a highly cost effective customer management solution, specifically tailored to your market.

This all results in a speedy and remarkably low cost solution for clients who need a best of breed CRM capability without the prohibitive costs and timescales which result from working with the traditional CRM vendors. Our completely integrated Microsoft Outlook user interface also means easy rollout and high adoption rates.

Cantata Vantage has been deployed to some of the best known names in the UK across all of our sectors, including Centrica/British Gas, the Advertising Standards Authority, ECM/Wells Fargo, Ofgem and PhonepayPlus.

True “out of box” business functionality, tailored for specific verticals

Vantage has been developed to meet the needs of clients in the specific verticals we support. For details of a particular vertical, Cantata has Vantage product summaries for Financial Services, Regulators, Membership Organisations, Energy and Utilities and Commercial Enterprises.

By configuring the system to meet the needs of these specific industries, we find project timescales are significantly reduced, user adoption rates are higher and ROI is achieved far quicker than traditional CRM deployments, without removing any ability to provide highly customised solutions for individual requirements as needed.

Infrastructure enhancements

Underpinning Vantage is a comprehensive extension of “infrastructure” capabilities to provide a basis for rapid integration to back office systems, support for advanced document management integration (going beyond standard integration features of the platforms), per-user and per-department tailoring of the user-interface presentation and powerful dynamic data presentation capabilities to ensure users are only shown information they are authorized to see and that is relevant to them.

For example, the user interface enhancements include “Excel-like” custom editable grids, which allow rapid data entry, and truly functional fields – e.g., carrying out calculations, highlighting validation and aggregating data from across the system.

Cantata Editable Grid

Search for Records by Firstname									
FirstName ↑	Bulk Email	Credit Limit	Calculated	Number Of Children					
Simn	Do Not Allow	--	1.00	--					
Maria	Allow	--	-1.00	--					
Simon	Allow	--	-1.00						
David	Do Not Allow	--	1.00	--					
Andrew	Allow	--	1.00	2					

Vantage provides specific functionality for advanced case working and case management requirements. This includes comprehensive case management features, and numerous “short cut” features such as “copy case” features which we’ve found to be invaluable in this space.

Integrated web portal with on-line registration support

Cantata’s web portal capabilities allow rapid deployment of “white label” functionality which can readily be tailored to your brand and integrated to your existing website.

Standard functionality allows web site users to register on the system, updated personal details (including marketing preferences) and manage event bookings through our integrated event management system.

We regularly extend this capabilities for our clients’ specific needs, commonly providing client reporting and bespoke transactional functionality for complex requirements.

We have supported integration to websites based on a variety of common platforms, including Sitecore and Umbraco Content Management Systems (CMS).

Vantage Microsoft CRM



Register your details [here](#).

Update your details [here](#).

Book events [here](#).

Events management

Vantage comes with a powerful events management system including a web portal for client access. The system is used to support the full range of events from general sales and marketing events to investor roadshows and fundraising.

The events system is fully integrated within the user interface, and includes functionality to support invitation-only and public events, multiple sessions per event, capture of marketing details at point of registration, badge printing, payment functionality, venue and delegate management.

Microsoft Dynamics CRM | MARKETING | Events | Investing in Renewa...

+ NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW ***

EVENT : INFORMATION

Investing in Renewable Energy

General

Name *	Investing in Renewable Energy			Owner *
Venue	Head Office			
Start Date	05/04/2015	End Date	05/04/2015	
Invitation Only	☐	Open For Registratio	☒	Publish On W

Marketing Lists

Invitation List	PT test	Wait List
-----------------	-------------------------	-----------

Charge

Charge	£20.00	Charge (Base)	£20.0000
Currency	Pound Sterling	Exchange Rate	1.0000000000

Publication distribution and management

Vantage provides comprehensive capabilities for publication distribution, which is used by our clients for anything from membership newsletters to investor communications.

The system allows comprehensive categorisation and marketing preference information to be stored, and automation of publication distribution based on these preferences. These capabilities go far beyond the standard features of normal CRM environments, for example allowing multiple attachments to e-mails to be sent, dynamically selected depending on preference information. Where required, we can integrate to a variety of e-mail management systems for high volume e-mail communication.

Microsoft Dynamics CRM | MARKETING | Publications | E-zine | Create Enter Search Item Cantata Admin Vantage UAT

+ NEW DEACTIVATE DELETE ASSIGN SHARE EMAIL A LINK RUN WORKFLOW ***

PUBLICATION : INFORMATION

E-zine

General

Name *	E-zine	Publication *	Ad hoc
Date of Edition	03/03/2015		
Description	Your publication		

Publication Distribution

Name ↑	Created On
cantata daily test	21/05/2014 10:07

Notes

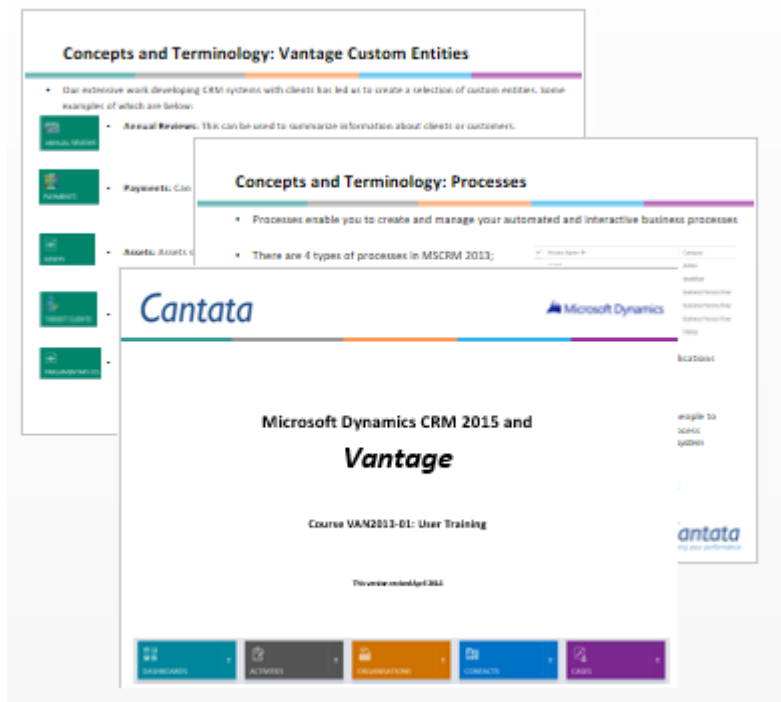
Enter a note

No Notes found.

Vantage training

One of the major advantages of implementing our Vantage solutions is that they come with comprehensive training which can be uniquely customised to your specific business needs.

We have developed a wealth of training collateral, including standard training courses which we can tailor as appropriate to your needs. These courses include basic and advanced user training, and specific courses for “super users”, configuration and workflow specialists and technical training.



Vantage support

Vantage comes with comprehensive, SLA-backed support, provided from our own dedicated, UK-based support team.

Cantata support goes beyond the typical IT support contracts many of our clients have experienced; our support team helps with anything from basic queries to advanced problem solving, and can provide additional configuration, customisation and development services as required.

Our support staff work hand in hand with our analysts and training professionals to ensure continued project success.

Vantage hosting

Conscious of the performance and security needs of our clients, we can offer Cantata Vantage as either an “on premise” or cloud-based, software as a service deployment.

Our cloud-based solutions are hosted from our own dedicated environment in the UK. As you would expect from our client list, we can offer comprehensive options around specific scalability and performance needs, Disaster Recovery options and security (including dedicated environments for your implementation) to meet the most demanding requirements.

Key features of Cantata Vantage

- True “Out of box” business functionality, tailored for specific verticals
- Extensive infrastructure enhancements, including usability improvements and integration
- Integrated web portal with on-line registration support
- Events management
- Publication distribution and management
- Support for both Microsoft Dynamics and Salesforce.com platforms
- On-premise and private hosted deployment options
- Comprehensive training collateral, standard courses and bespoke training options
- UK-based, SLA-backed support

For more details please contact us at

Cantata Limited
33 St James's Square, London SW1Y 4JS
+44 (0) 207 898 9210
sales@cantatagroup.com

Our Oxford technology centre is at:

Cantata Limited
Magdalen Centre, 1, Robert Robinson Avenue, Oxford OX4 4GA
+44 (0) 1865 784000
www.cantatagroup.com