Sales Pipeline Management System

Sales executive dashboard:        Shows activity statistics on

Total leads

Assigned/fresh leads

Closed deals

Deal value

Not interested

Under Dashboard

Total number of leads

New Leads assigned –   shows the leads that were uploaded today

                                                View

                                                Download

                                                Sample request – Tab -> this request is sent to the samples guy

                                                Drop down to manually type this request

                                                Dispose – follow up date – Calendar date

                                                Download samples

Self-generated leads –   if the sales person is generating leads this shows here

                                                View the status of the lead

Follow up’s -                     The progress of the lead by date

                                                Notes/ Record client’s comments

Hot Leads –                        Work order, Proposal sent

                                                Record client’s comments

Closed -                                Deal value

                                                Upload work order received by the client

                                                Upload project – Unique pane

         Audience

         Total Counts

         Delivery Due on     -        min 3 business days

         Samples        -                     that were shared with the client

         Client’s comments/Criteria   -   as discussed with the client

Not interested -                drop down to understand why –

-          Pricing

-          To early or time bound

-          Just an inquiry

-          Samples not matching

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Dead lead – No reply after calls