/GreatLexon/MoyoArbor/Cendore/DuePark/WallyRave/HayForest

CRM for Businesses

Moyo Plaza - A CRM system brings customer’s complete history with your business exists alongside a list of your deals; your emails, notes, and appointments live in one interface and can get real-time notifications when your customers perform a significant activity—like when they visit your Pricing page or click on a link in your email. At its core, CRM software helps you build lasting relationships with your customers.

**The technical specs:**

CRM systems were initially hosted on physical servers, but they’re increasingly moving to the cloud.

CRMs are mainly web-based applications. They’re still developed primarily for desktops and laptops, but now they’re also optimized for mobile.

Can integrate CRMs with a variety of applications like marketing automation tools, live chat software and helpdesk software. Unlike spreadsheets and email, CRMs let you collaborate swiftly and in real time.

### Lead management

Can get a dedicated interface with a list of your leads. Clicking on a lead opens up a screen like the adjoining image. Everything you need to know about the lead—their demographic details, “lead score”, latest conversations with your business, activity on your website, even their recent tickets—is available on one screen. Can also perform important actions, like emailing/calling the lead, jotting down a note and setting up an appointment, without leaving this screen. Every lead has a world of their own, and that’s what the CRM system captures.

### Pipeline management

CRM systems have what is called a “visual sales pipeline” view. This is an overview of all deals, grouped under different stages, and arranged like a pipeline. One look at this screen and you know where you should start for the day. You also get nifty little abilities, like being able to drag and drop deals between stages, and calling/emailing contacts associated with a deal; everything to save precious sales time.

### Built-in phone

When a CRM has built-in phone functionality, it means a lot of things. For starters, you don’t have to use separate telephony software to make calls. You also don’t need to integrate the CRM with call management applications. You just need to place calls with a click—the CRM system automatically logs calls, maps the recording to the respective lead’s profile, and even helps you record voicemail greetings. Plus you can purchase numbers for your region and assign them to your reps, all from the CRM.

### Email

Switching between your email client and your CRM is a time sink. A CRM with which you can integrate your email—whether that’s Gmail, Office 365 or any other client—means you spend less time navigating between applications and have more time to think through the content of your emails. You should also look for email templates in the CRM to send standard responses (among other uses). And not to forget email metrics—tracking open rates and click-through rates.

### Reports

CRMs understand that if you can’t measure your performance, you can’t improve it. And with all the data stored in a CRM system, using it to generate reports is the next logical step. You can create different types of reports—deals closed this month versus last month, leads converted this quarter versus last quarter, and so on. It’s important to choose a CRM that offers flexibility; you should be able to whip up a standard report using a template, *and* you should be able to dive deep and create a report for your unique use cases.

### Automation

In sales there are tasks you do on a loop. Like sending out invoice reminder emails. Or changing the status of deals from “Negotiation” to “Won.” All these actions are based on triggers—when the billing date is closer, for instance, you send the customer a reminder email. This trigger-action formula is the basis behind creating workflows in a CRM. Workflows are automated tasks based on rules you define. Which means the important reminder email is sent by the CRM, on your behalf, at the right time—and you don’t have to remember to do it.

CRM for start-ups

BeeHive - For a start-up to stay nimble and move fast, reps need a single tool that fundamentally gives them more time for selling. A sales CRM stores your contacts, lets you make calls. It helps you send and track emails, generates reports and brings a clear view into your pipeline and helps you focus on winning the next deal and can focus on stabilizing and scaling your start-up.

### Lead management

This module gets a 360° view of the lead in one screen—complete with their professional details, their activity on your website (and in your app), the meetings you’ve had with them, even their social media information. Can also sort leads by various filters including lead score, a score assigned to leads based on their engagement with your company. And if you’ve stored your leads on Excel, don’t worry—start importing your leads with a single click.

### Email management

Can integrate your email with the CRM. Creates email templates for quick communication, sends bulk emails, and understands recipients’ behaviour by tracking email opens and link clicks. Plus there’s Team Inbox, a single inbox for multiple email addresses in your company. With Team Inbox, any member of your team can step into an important conversation with the customer, get instant context, and take the dialogue forward.

### Pipeline management

helps visualize sales process with a pipeline view that’s easy on the eye and easier to use. A drag-and-drop is all you need to do to move deals from one stage of the sales funnel to another. You can also list your deals if you feel like it, and then sort them using factors like expected close date, deal value and date when the deal was created. If one pipeline doesn’t capture your sales process(es), feel free to create multiple sales pipelines.

CRM for small business

**BlueCore**- builds better relationships with existing customers, gain new ones and grow business and is equipped with just the right features small business would require in a CRM.

It offers contact management software, deal management tool and communication platform to build better customer relationships and win more deals. The feature-rich customer management software also includes visual reports to track deals and make smart decisions on the sales front. Can even communicate with your customers via phone and email.

### Contact management

## 360° view of leads

Everything about a lead is captured in one screen—their demographic information, their conversations with you (over phone and email), and any notes, tasks appointments and files related to them. Can also use this interface to directly call leads or start a new email thread. Which means every lead’s status is a click away, focus is concentrated around a lead, and will be in a better position to make well-informed, prudent decisions.

## Work on your best leads

When you have a list of leads you don’t want to be confused about whom to approach first; you want to quickly identify which leads are more likely to become customers. That’s where lead scoring helps; Start by setting rules around characteristics like the lead’s job title and industry type. Based on these rules, the lead gets a score out of 100. then surfaces hottest leads, making it easier to reach out to them first. That means lesser time digging through leads and more time for you to perform decisive actions.

## Make calls and log them

With a single click and without leaving the CRM, you can start calling from the built-in phone. Also automatically logs your calls, so no need for data entry. Add to this a bunch of handy abilities: recording calls, forwarding calls to other reps/territories, and leaving voicemail.

### Sales Deal Management

## Visual Pipeline

A visual sales pipeline makes working with deals as easy as possible. Gets a complete visibility of deals across stages. Quickly see how many deals are in each stage; sort and filter by their expected close date. With a customizable sales pipeline designed for deal management, move deals up the sales ladder, make smart decisions, and get recurring results.

Easily switch between the list and the funnel view. Know how much business you’re likely to close in the coming months, spot bottlenecks, and drive them to closure.

## Drag and Drop Navigation

Easily move deals up the sales pipeline for different products or services, recurring revenues, new verticals or larger clients, by dragging and dropping a deal into any stage. Can customise entire sales process in minutes and filter down deals based on size, company and other aspects, making deal management easier.

Quickly edit deals and add owners while navigating. Can Keep track of business revenue flow with won and lost stages in the visual sales pipeline.

## Follow-ups

Instantly connect with potential prospects by phone and email, directly from the deals dashboard which enables a non-interruptive workflow for deal management.

### Analytics and Reports

## Sales activity reports

Every sales activity ties back to the ultimate goal: getting contact to sign the deal. The emails you send, the calls you make, the tasks you create and the appointments you schedule—everything counts. That’s why it’s a good idea to keep track of these activities through reports. [Sales activity reports](http://blog.freshsales.io/freshsales-introduces-sales-activity-reports/) help you cut through the noise and figure out exactly how your reps are approaching their deals.

## Sales cycle and velocity reports

If the number of deals won tells how sales reps are performing, another interesting stat for analysis is “deal age” i.e. the average time it takes to crack a deal. It’s an indication of how sales reps are hustling for each deal, and it’s the metric you get with sales cycle reports. An allied report (and a useful one) is the sales velocity report. It breaks down each deal by days spent in each stage. So now can find out why new deals some sales rep’s pipeline take 15 days to move to the next stage.

## Trendy reports

Analyzes trends week-on-week, month-on-month or quarter-on-quarter. Can also use these numbers to make forecasts, like predicting expected close date for deals.

## Report dashboards

Dashboard (in the context of reports) displays data in multiple formats on a single screen. So if a set of reports turn to every day, put them together on a dashboard, and view charts, tables and trend lines come together on your screen. Can always customize dashboards and share them with sales reps, internal teams and leaders/decision-makers.

Real Estate CRM Software

RedGiant - A CRM for Real Estate - can easily find new leads, communicate over email and phone, manage existing clients, stay on top of your sales pipeline, customize reports, access data from mobile and more -- in short, has the right features for residential and commercial, real estate developers, brokerage, brokers and agents.

###### Centralized database

One unified contact management system to keep tab of all clients and all the information that goes with it. Easy to collaborate with your partners as all the information is in one system.

###### Transparent interactions

Holistic view of the touch points with a client -- conversations, appointments and activities on email and website -- for faster response time and follow ups so they keep coming back to you.

###### Automation

Automating the mundane tasks such as capturing prospects from website, sending follow-up emails and more, so you can focus on building long-lasting relationships and closing more deals.

### Manage your clients

Stores and pulls out client information (prospects, landlords and tenants) when you want to reach out to them. CRM automatically captures website visitors as leads and automatically enriches their social profile information. The CRM software also scores leads, enabling to prioritize follow-ups better. Can sync Google Calendar or use the native tasks and appointments so there won't be any fall back on your follow-ups.

### Automate activities

Often, clients are on a tight schedule when searching for a property, and they usually approach more than one developer/agency at the same time. In most cases, they choose the agent who has provided a quick response for their concerns and questions. Can set up personalized response that addresses concerns and provides valuable information, or automatically send a reply that tells the client that you have received the message. Can also set up follow up tasks if the client hasn’t replied back or has gone cold.

### Customize reports

The real estate management system allows to create daily, weekly, monthly, quarterly and annual reports, helping analyze the areas that makes the most sales, the agents (if any) contributing to the sale, the reasons for lost deals, the number of meetings scheduled by your team. Analyze trends using drag and drop dashboards, share them with team and make smart decisions.