RELISYS

Customer Relationship Management

Manage Relationship with Existing and Potential Customers

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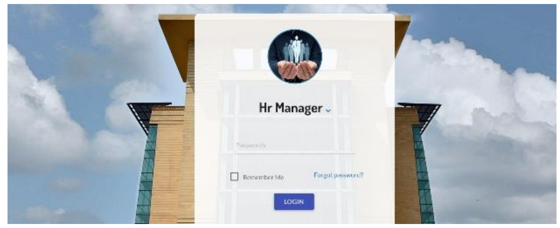

RELISYS CRM allows business to manage relationship with the customers and potential customers effectively. It gives more visibility in the sales process and equips sale team to perform routine duties effortlessly.

a) Automate your workflows

RELISYS CRM allows to automate current workflow of lead association. Which gives sales team more time for productive tasks, and they will be able to close more sales effectively.

b) Data driven decision making

RELISYS CRM allows you to make data driven decisions which can shape your organization future. It allows to find the elements which are directly associated with sales. And focusing on these elements, allows business to achieve sales targets easily and save precious resources.

c) Covering complete customer cycle

RELISYS CRM covers complete sales funnel. You can define different stages of conversion as per your business requirements, e.g. Lead, Opportunity, Qualified Opportunity, and Customer.

d) Revenue in Pipeline

RELISYS CRM allows you to define potential revenue against each lead. And you will be able to see the estimated revenue in each sales funnel stage. Which will be helpful in making decision regarding revenue forecast.

e) Web based application

RELISYS CRM Module is web-based application, which can be accessed easily from anywhere. You just need a stable internet connection and browser to access your login with all configured authorities.

f) Mobile App:

RELISYS CRM mobile app enables sales team to plan activities easily. RELISYS mobile app is readily available on Google paly store.

2) Functions:

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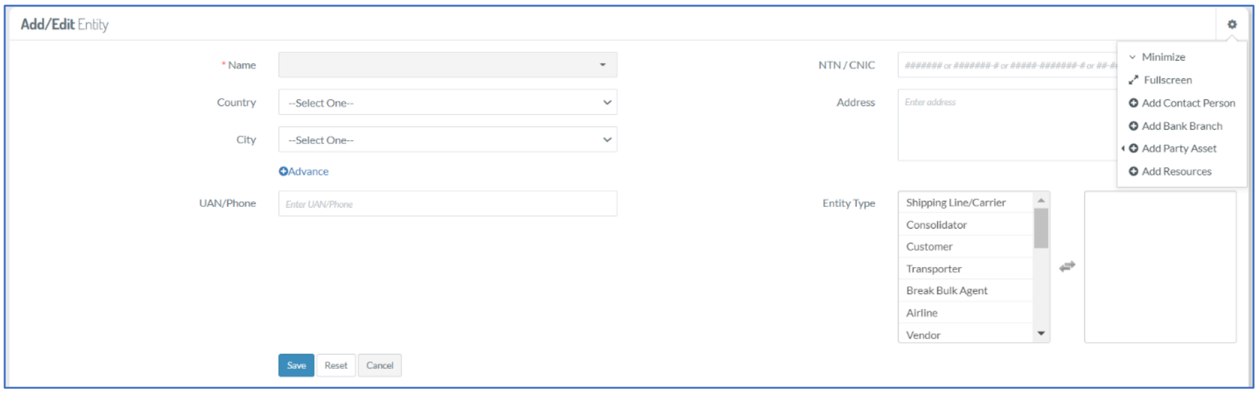
3) Manage Lead

a) Create New Lead

RELISYS CRM allows you to create a new lead with distinctive name and assigning Customer in Entity type. System will require further information on later stages e.g. Due Diligence, Quotation sharing, and Opening a new job.

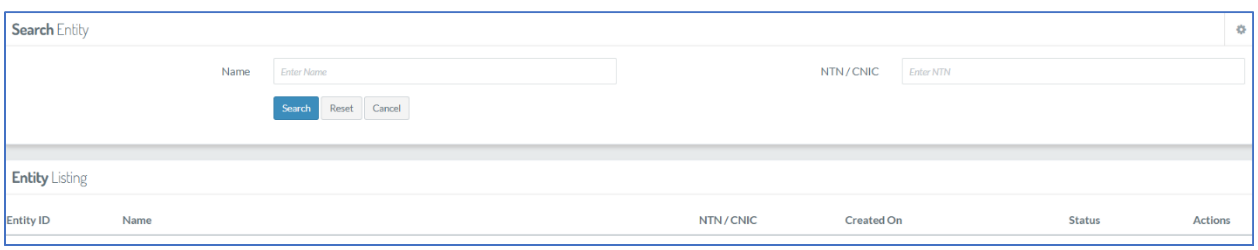


b) Central Entity Repository:

RELISYS CRM allows to maintain a central entity repository for the whole organization, which prevents data duplication and business can ensure consistency. It allows to attach different types with entity and system requires different information as per entity type assigned.

c) Search Existing Leads / Entities

Search screen allows to search existing Leads / Entities, you can add further data and view the information associated with it.



d) Support Customer Registration Desk:

In order to ensure standardization, RELISYS CRM allows to give access (through user management) to designating personnel. Who will be responsible for approving the registration for Leads after reviewing the required information.

e) Configurable Approval Workflow

For lead registration, you can define a customized approval workflow. RELISYS CRM will follow the configured workflow and route the lead registration request accordingly. It maintains complete history of approval workflow as well.

Approving authority can return the workflow with relevant comments, which will be the part of workflow history.

4) Sales Team Management

a) User Management:

RELISYS CRM allows to create separate roles for the sales team covering Sales Representative, Manager, and HOD. These roles will be able to view the data according to the set hierarchy.

b) Define KPI's

RELISYS CRM allows to define division wise KPI's for the sales team members. We can cover the following elements here:

i. No. of Calls / meetings per day
ii. No. of Visits
iii. No. of Quotation
iv. Gross Profit Targets

c) Real Time KPI's Monitoring

RELISYS CRM allows to monitor set KPI's for the sales team on real time basis. Reporting authorities can view the progress from there dashboard.

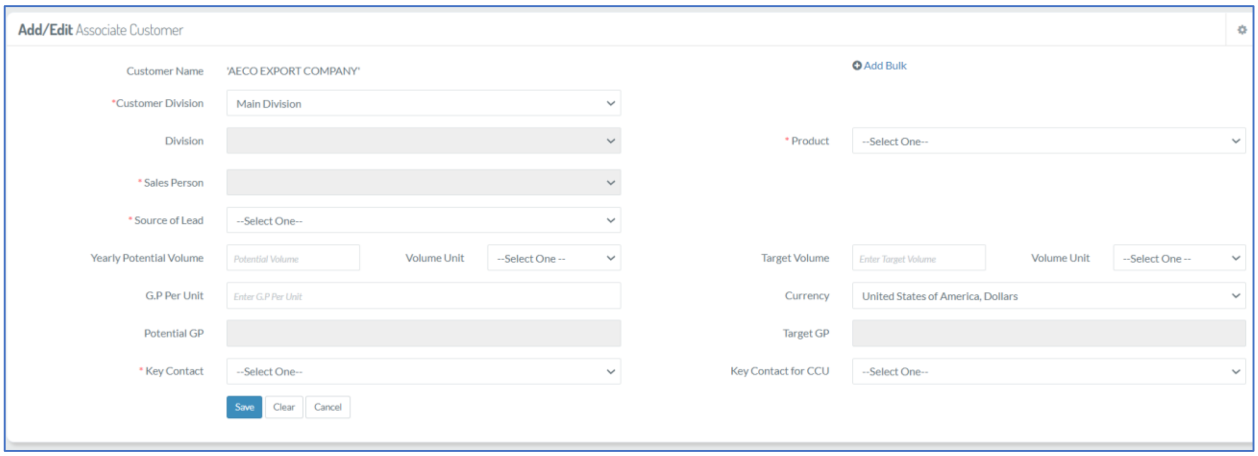
5) Lead Conversion Lifecycle

RELISYS CRM allows to configure lead / customer conversion lifecycle as per business requirements. We can attach certain events, based upon which system automatically changes the stage of lead.

a) Lead Association

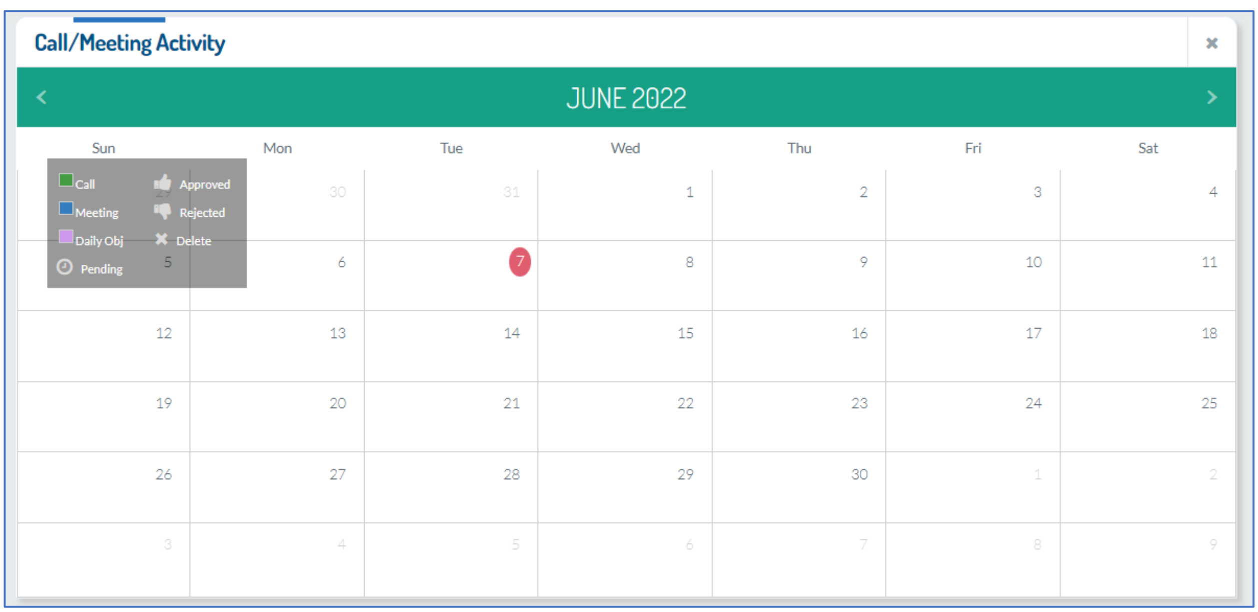
Once lead is approved and available in system, sales person can request association of that lead by providing information e.g. potential gross profit and target gross profit.

Once association request is submitted sales manager can approve or decline the association request. This step allows sales manager to allow association of lead with most relevant sales person.

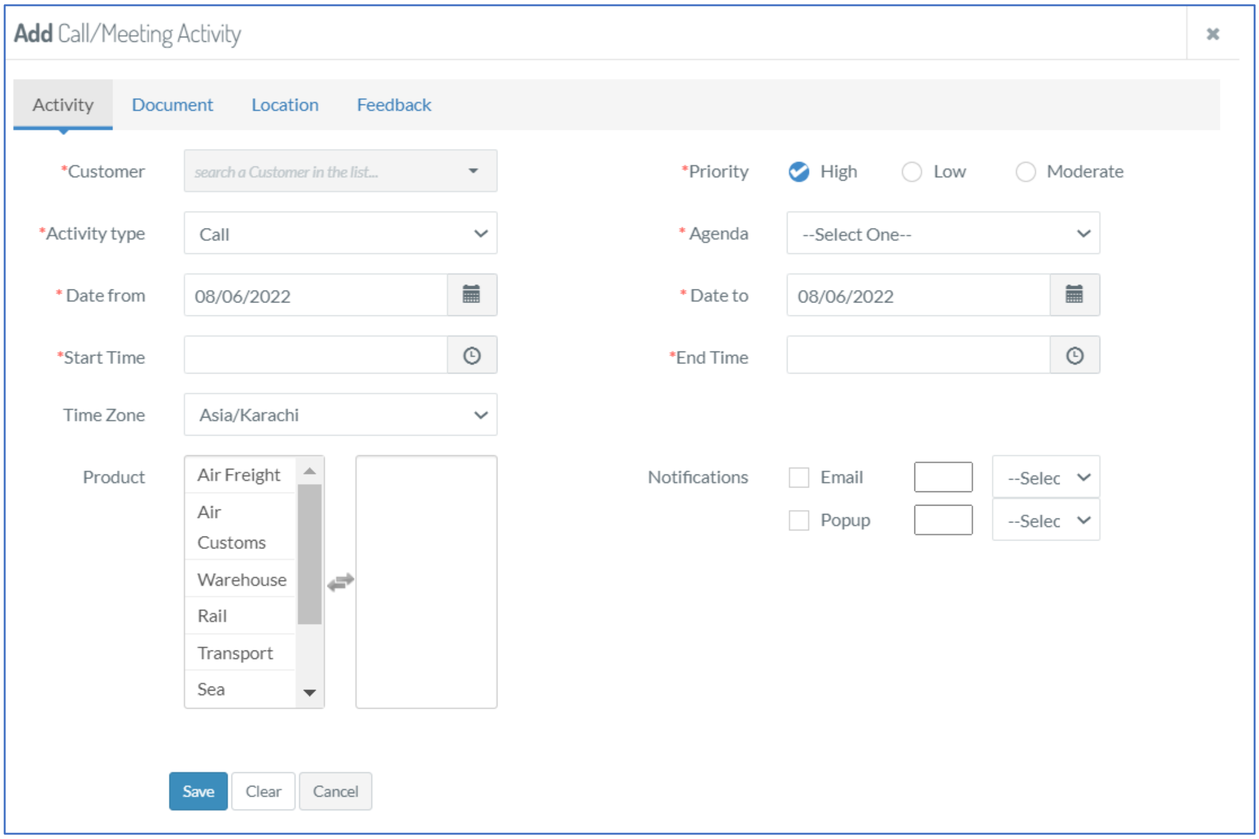


b) Activity Planning

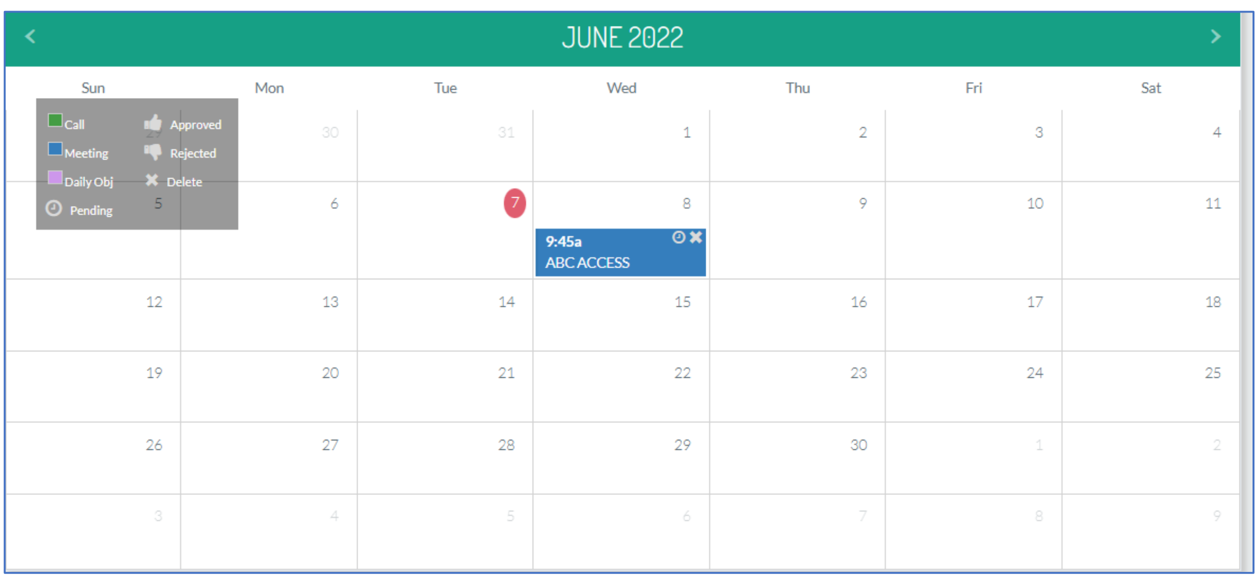
Once customer is associated, relevant sales person can plan the activities with lead. Calendar has been provided on the dashboard, which allows to plan activities easily.



Click on relevant date on which you want to plan activity (Call or meeting). System will ask for the further information



And record will be saved:



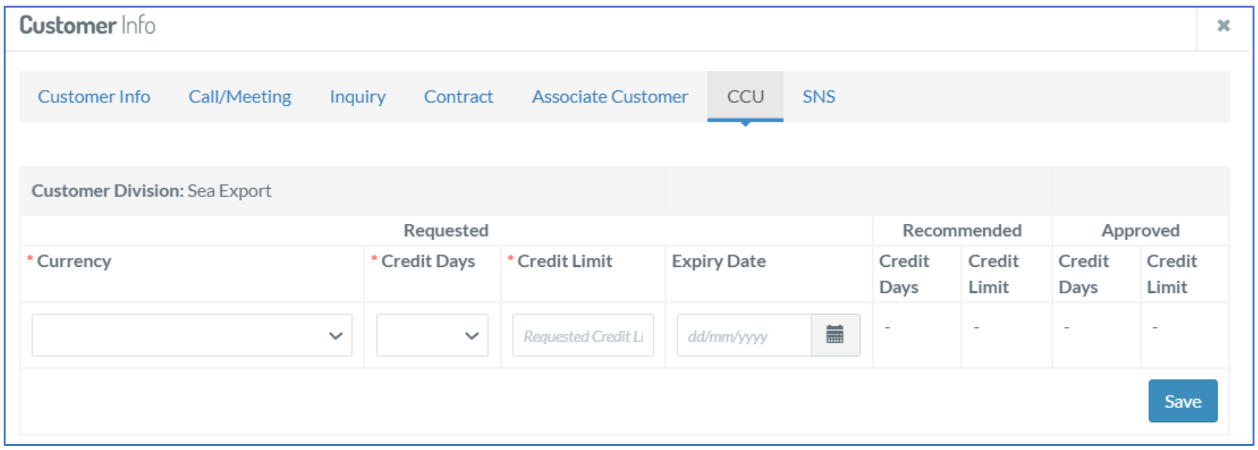
Calendar allows the sales person to plan the day accordingly.

c) Due Diligence

RELISYS CRM allows to take approval from due diligence or security department before proceeding with a lead. You can define different parameters on which system will take approval from nominated or authorized personnel and after approval sales person will be informed accordingly.

d) Credit Control

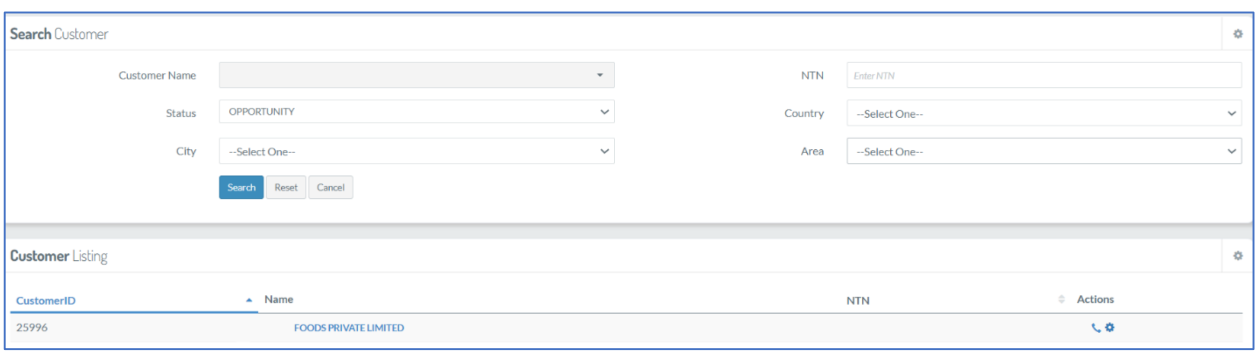
RELISYS CRM allows you to set limit for credit for the leads / customers. Sales person can request Credit Limit from login after providing values for Credit Days and Credit Limit. This request will follow the set approving hierarchy and after approval sales person will be notified and approved limit will be available to view from his login:



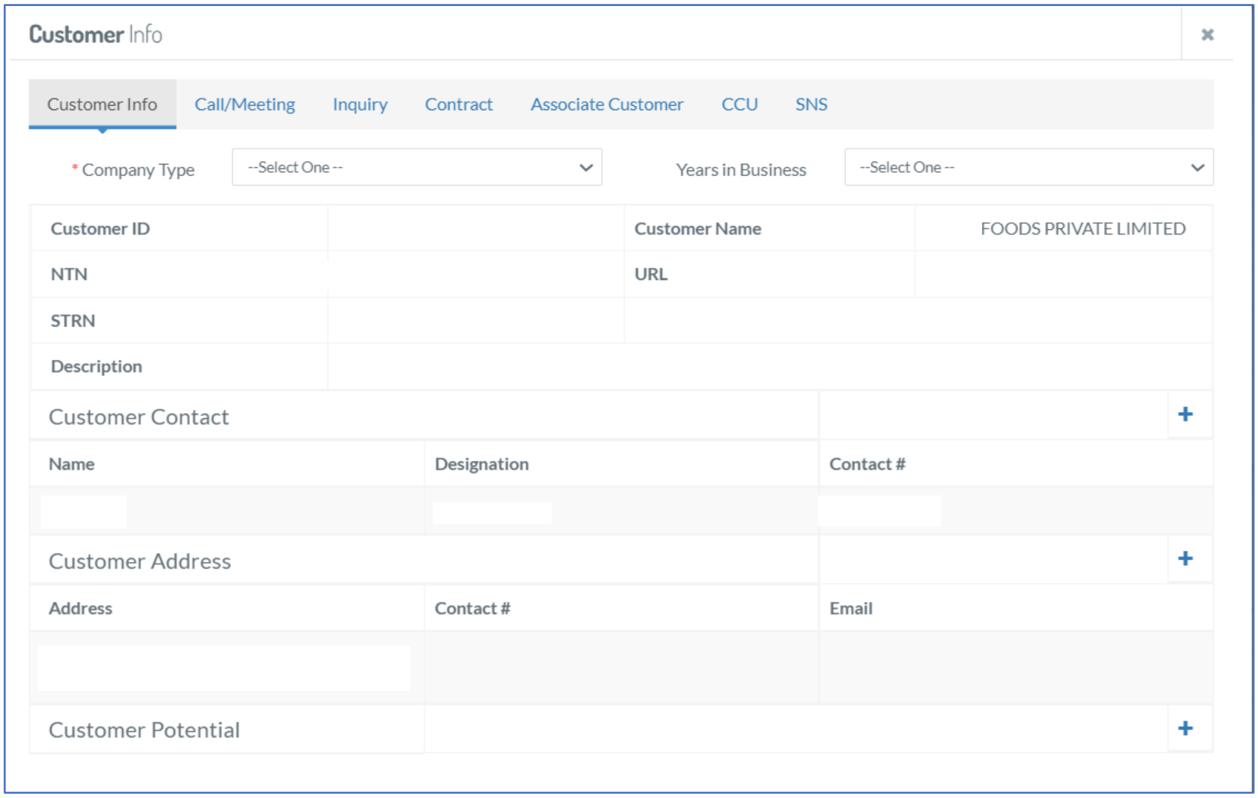
e) Customer Consolidated View

RELISYS CRM allows to view all the relevant information regarding customer at single place. Sales person can perform all the required actions from a single interface:

Search required customer from listings:



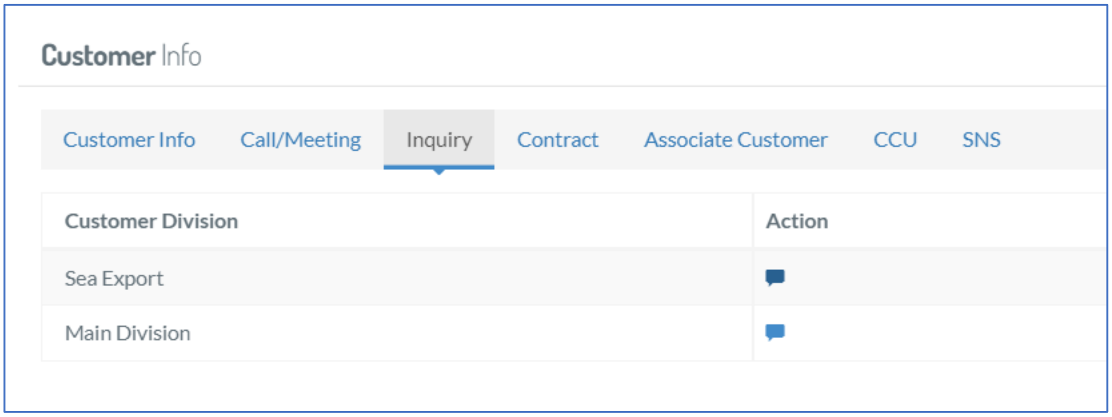
Click on the customer name and system will open consolidated view for customer:

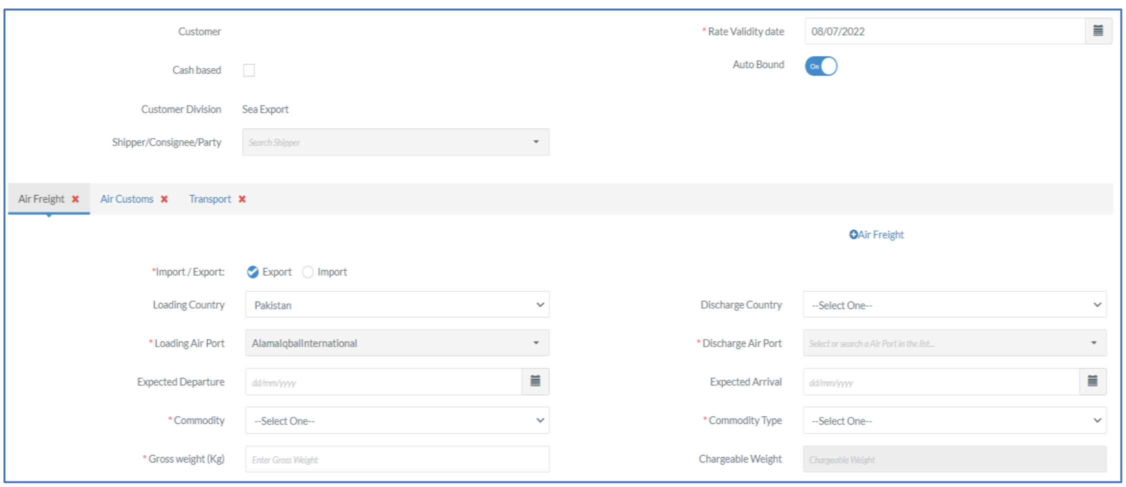


f) Add Inquiry

RELISYS allows to configure multiple products in CRM, and user can define the different product wise requirements.

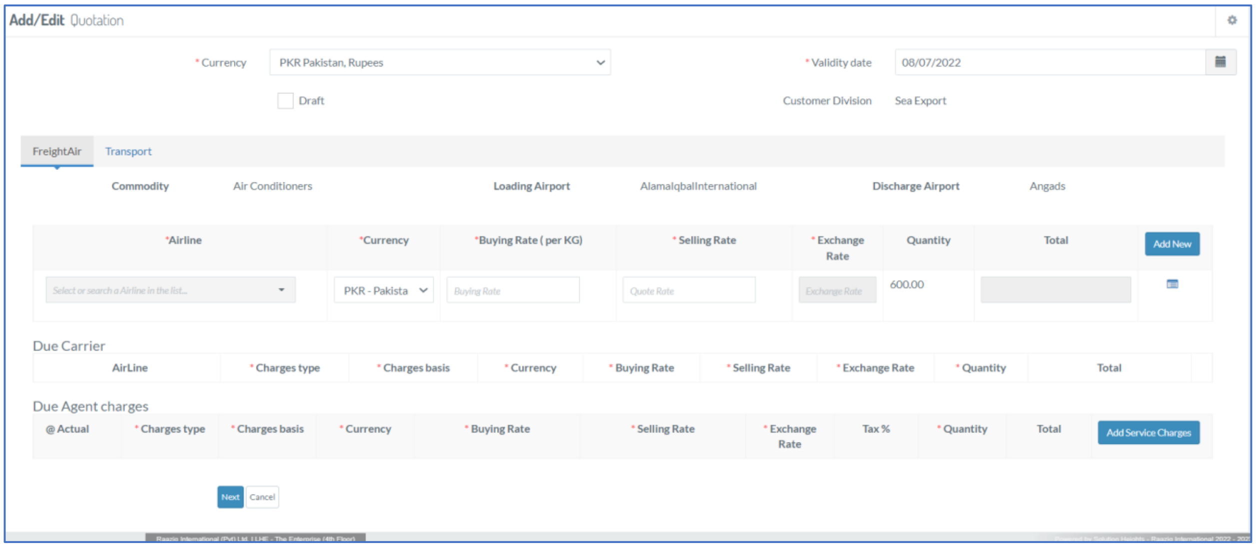
Sales person will select the inquiry against mentioned product.





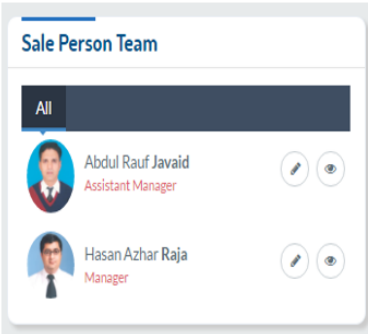
g) Add Quotation

Sales person can add quotation after selecting the relevant fields and providing buying and selling. After saving the quotation, RELISYS CRM allows to download PDF in multiple formats as per customer requirements.



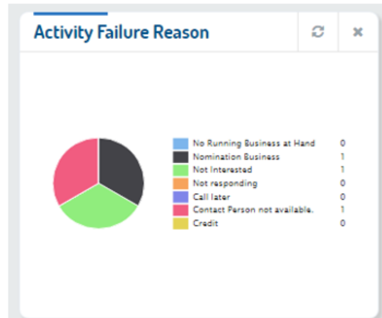
6) Dashboard

Sales Person 360 View

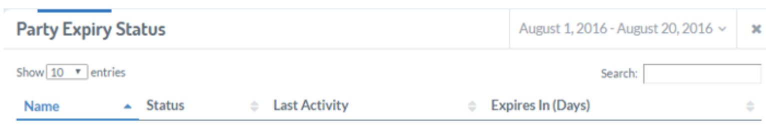


KPI Report Target VS Actual

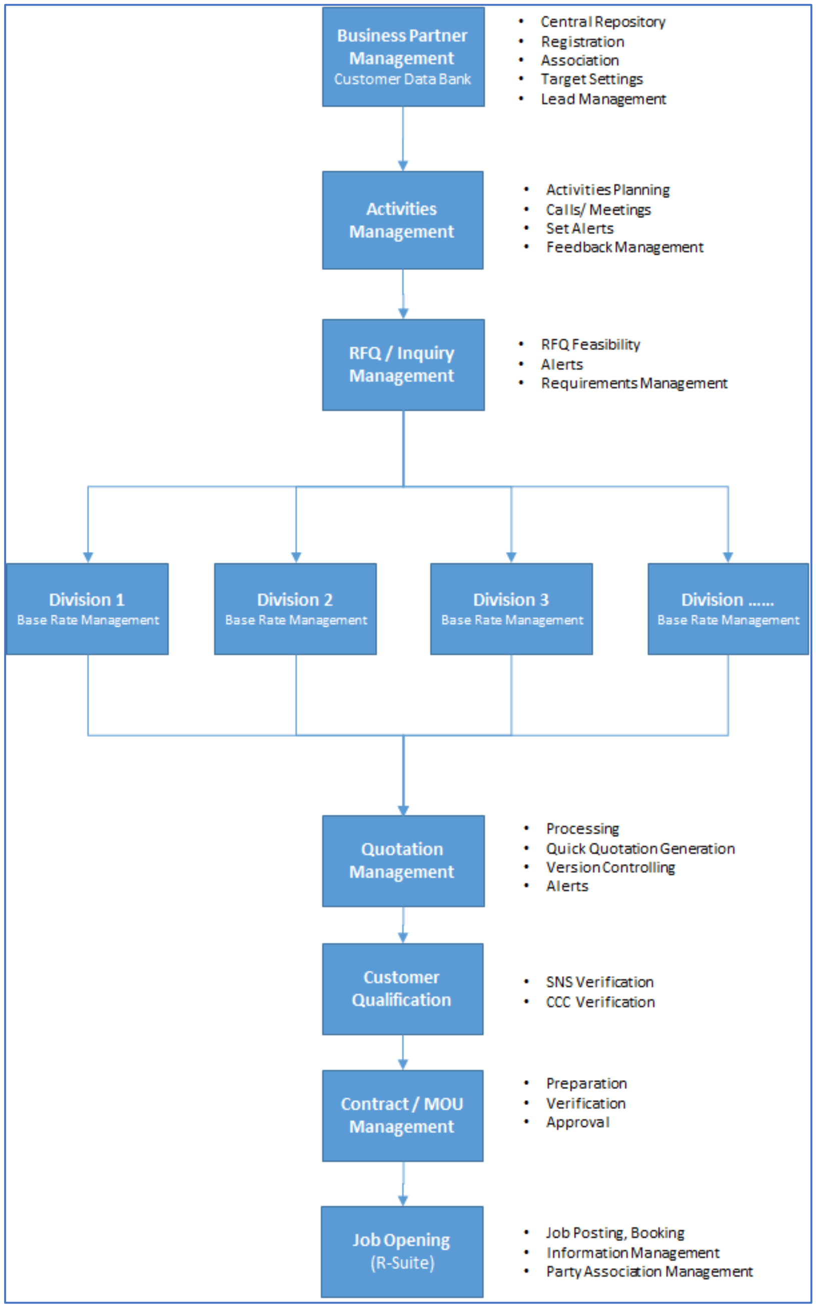
Call Failure Reasons



Party Expiry Status Report



7) CRM Flow



Business Partner Management
Customer Data Bank
Central Repository
Registration
Association
Target Settings
Lead Management
Activities Management
Activities Planning
Calls/ Meetings
Set Alerts
Feedback Management
RFQ / Inquiry Management
RFQ Feasibility
Alerts
Requirements Management
Division 1
Base Rate Management
Division 2
Base Rate Management
Division 3
Base Rate Management
Division ......
Base Rate Management
Quotation Management
Processing
Quick Quotation Generation
Version Controlling
Alerts
Customer Qualification
SNS Verification
CCC Verification
Contract / MOU Management
Preparation
Verification
Approval
Job Opening
(R-Suite)
Job Posting, Booking
Information Management
Party Association Management