CRM

VijayErp
Ph:9213676208
www.vijayerp.com

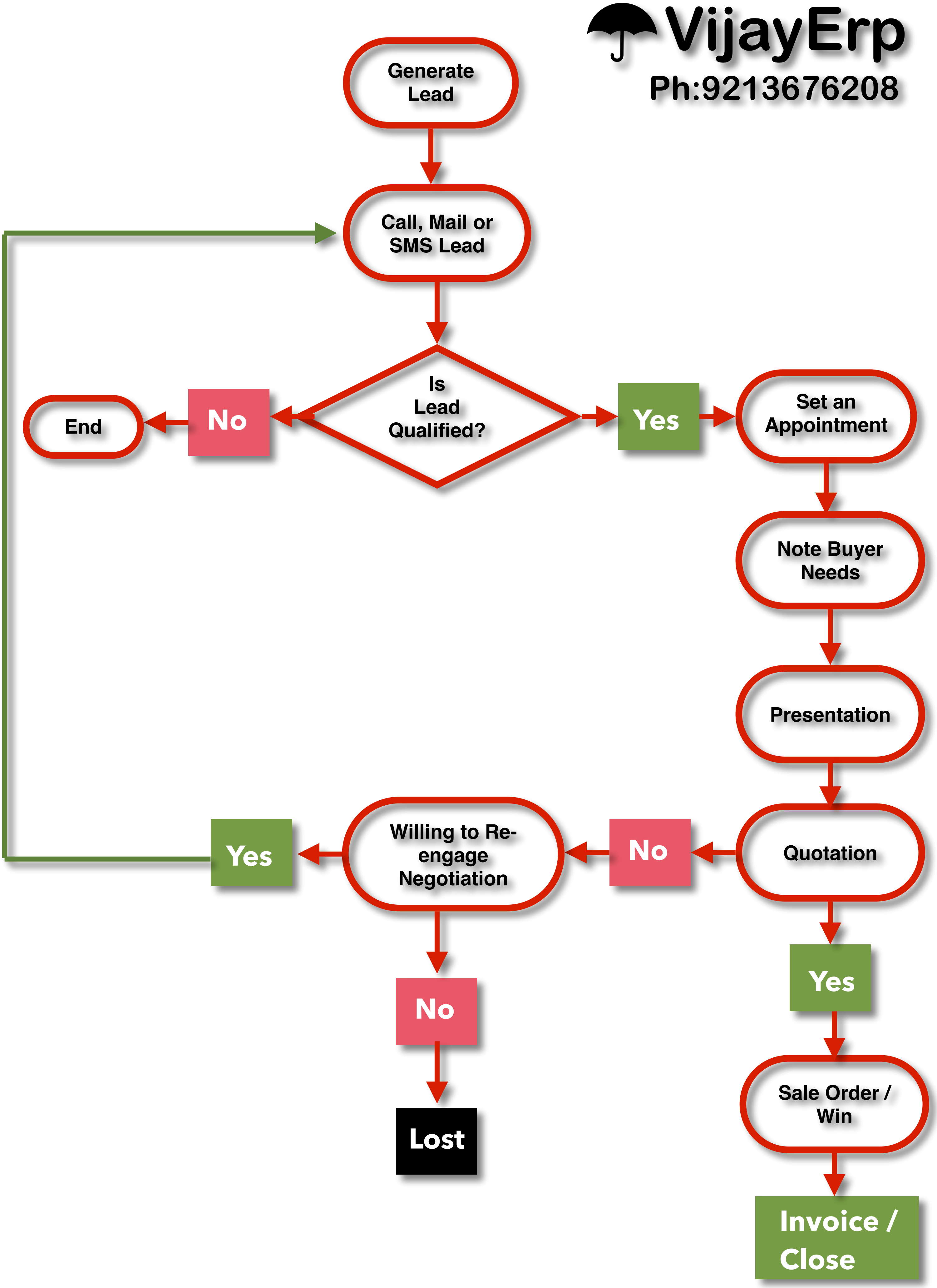
Customer Relation Management

CRM, or Customer Relationship Management, is a software application that enables businesses to efficiently manage their interactions with customers, leads, and prospects.

The software stores all relevant information about customers, including their contact details, purchase history, and preferences, in one centralised location, making it easier for businesses to gain a comprehensive view of each customer.

Moreover, CRM software provides businesses with a range of tools to improve customer relationships, such as automated marketing campaigns, customer segmentation, and analytics.

By utilising CRM software, businesses can streamline their customer management processes and ultimately increase customer satisfaction and loyalty.


VijayErp
Ph:9213676208
Generate Lead
Call, Mail or SMS Lead
Is Lead Qualified?
No
End
Yes
Set an Appointment
Note Buyer Needs
Presentation
Quotation
No
Willing to Re-engage Negotiation
Yes
No
Lost
Yes
Sale Order / Win
Invoice / Close

Generate Leads

Generating leads is a crucial part of the CRM process. To generate leads, you don't have to add personal entries one by one. Instead, you can simply import the data and generate leads in bulk. This saves time and effort and ensures that the lead generation process is quick and efficient.

Call data

IMPORT BACK

Show 10 entries Search:

Sr No.	Gstin	PartyName	Address1	Address2	City	State	Source	email	phone
No data available in table									

Showing 0 to 0 of 0 entries

Previous Ne

Connect with Leads

If you need to delegate a lead to one of your employees or coworkers, you can easily share it with them. To do so, first select the lead you want to share, and then choose an action to perform on it, like sending an email, making a call, or sending an SMS. Once you've selected an action, you'll be prompted to choose the name of the employee or coworker you wish to share the lead with. This will automatically create a task in their dashboard, allowing them to start working on the lead right away. By sharing leads in this way, you can ensure that everyone on your team is working efficiently towards the same goals.

Set an appointment

Every conversation and option discussed between the employee and the lead is saved as a history. This ensures that any time we or any other employee engages with the lead, we can access all previous commitment offers. Furthermore, the lead's status can be updated as necessary. For instance, if they express interest in our product, we can arrange an appointment for them to meet with the next available employee. Once the appointment is scheduled, the lead will appear on the dashboard of the employee they are scheduled to meet with. This system allows us to effectively track and manage our leads.

Note Buyer Needs

As a seller, we value the feedback and input of our buyers. They often express their pain points and provide suggestions on how we can improve our offerings. We understand that each buyer has unique requirements and preferences when it comes to the products they purchase. Therefore, we make it a point to update the lead's history with all the relevant information shared by the buyer. This enables us to tailor our products and quotations to better meet their needs and ensure their satisfaction. By considering their suggestions and pain points, we strive to provide a personalised and fulfilling shopping experience to our customers.

Presentation

When it comes to giving a presentation, you have two options available. You can either choose to present during the first appointment or schedule a separate time for the presentation. Regardless of which option you choose, it's important to keep track of certain metrics. For example, you should take note of how much time was spent during the presentation, the level of interest shown by the lead, and any important points made by them. These factors can play a crucial role in securing the order, so it's important to keep them in mind. Be sure to update this information during this phase, so that you can make informed decisions moving forward.

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Quotation

The process of obtaining orders for a business is often dependent on providing an accurate quotation. A quotation serves as a detailed document that outlines various commercial details that are crucial to finalising the order. These details may include payment terms and product quantity, among others. The quotation is an all-encompassing document that covers all of these critical aspects, ensuring that customers are fully informed about their purchase. It is expected that once this document is provided, the order will be placed without any further complications. Additionally, quotations offer an added advantage of making it easier for customers to create purchase orders. This streamlined process allows for efficient communication and a smoother transaction overall.

Sale Order / PO

Production cannot begin without a purchase order from the customer. This purchase order serves as a sales order for us, allowing us to procure inventory, create a production plan, and provide it to our team. By manufacturing the specified product, we indirectly meet the customer's requirement needs. The sales order is a confirmed document that enables us to supply materials to the customer and initiate production.

Win / Close Lead