



Sales Management (CRM)

An up-to-date look at market and business

Summary

Sales Management solution provides the organization with visibility and control on sales activities from planning to execution, which includes account planning and management, contact management, lead and opportunity management. Combined with the financial management, project and service management capabilities, it provides full end to end management from sales to final service delivery.

Benefits

- Cost and time savings.
- Reduced costs.
- Faster realization of intended business benefits.
- Improved productivity and efficiency.
- Faster time-to-market.
- Increased business performance.

What is it?

Sales Management is a great tool to help businesses deal with the task of managing your leads, opportunities, contacts, customers and partners. Using CRM best practices, you can see everything about a lead or a contact — from background, email history and important dates, to any projects or opportunities in which they have participated.

Convert
data in
opportunities



Key Capabilities

Sales Management solution provides the following Key Capabilities:

- Manage your sales cycle, from leads to opportunity management, to delivery. Asset management.

Opportunity	Status	Opportunity Manager	Responsible Unit	Customer	Business Line	Expected Close Date	Probability
Consulting Services	Processing	Dianne Doorn	BU Switzerland	UK Company	Project Portfolio Management	2016-12-31	35%
Microsoft Tur Job	On Hold	Milton Moore	BU Spain	Quintus LLP	Project Portfolio Management	2016-11-28	70%
Off Site Tape Storage	On Hold	Milton Moore	BU Spain	Alvarez Industrial Corporation	Project Portfolio Management	2016-06-30	35%
SPV implementation	Processing	Igorac Heber	BU Sweden	Quis Massa PC	Service Catalog	2016-11-30	10%
ISA implementation	Processing & Guide	Tai West	BU Portugal	Dibendum Sed Industries	Service Management	2016-10-31	70%
Software implementation	Processing	Dianne Doorn	BU Spain	Quis Massa PC	Service Management	2016-12-31	10%
Software implementation	Processing	Tai West	BU Switzerland	UK Company	Service Management	2015-01-15	10%
Off Site Tape Storage	Project Creation	Milton Moore	BU Denmark	UK Company	Enterprise Architecture	2015-01-31	10%
Application Monitoring	Processing	Tai West	BU Portugal	On Consulting	Service Management	2016-11-27	35%
Service Management implementation	Processing	Dianne Doorn	BU Sweden	Quintus LLP	Project Portfolio Management	2016-10-18	70%
CRM Consulting	Processing	Spencer Norton	BU Netherlands	Quis Massa PC	Service Management	2016-12-31	10%
Application Monitoring of new value system in support of ERP - Boston Field Office Action 016	Processing	Dianne Doorn	BU Switzerland	On Consulting	Business Service Management	2016-10-31	10%
Infrastructure	Value Proposition	Tai West	BU Spain	Quintus LLP	Service Management	2016-10-31	35%
SPV implementation	Processing	Spencer Norton	BU Netherlands	Conubia Nostra Per Ltd	Project Portfolio Management	2015-04-27	10%
Consulting Services	Processing	Spencer Norton	BU Denmark	Nullem Vitar LLP	Project Portfolio Management	2016-12-31	35%
Enterprise architecture	Value Proposition	Tai West	BU Switzerland	Nullem Vitar LLP	Business Intelligence	2016-11-09	35%
Application Monitoring	Processing	Igorac Heber	BU Portugal	Nullem Vitar LLP	Service Management	2016-10-31	10%
SPV implementation	Processing	Dianne Doorn	BU Denmark	On Consulting	Service Catalog	2016-08-28	35%

- Understand the resources needed for the delivery and when.



- Visibility and control of the whole pipeline across the organization and segmented by different views (region, unit, business line, ...).
- Understand the different stages of your pipeline, their probability and benefits.

- Manage your accounts and contacts.



Dashboard / Delivery Overview

Top 10 - Best Margin Projects

Filters: Entity Type: Project

Entity	Account	Cost Plan Value	Cost Actual Value	Benefit Plan Value	Benefit Actual Value	Actual Margin
STORRS 101 RE-DESIGN - CONSTRUCTION	Montes Nascetur Corporation	0.00 €	0.00 €	175,490.00 €	175,490.00 €	100%
ATKINS G-20 COOLING SOLUTION - DESIGN	Dibendum Sed Industries	0.00 €	65,869.86 €	328,362.43 €	328,364.43 €	79%
ATKINS G-20 COOLING SOLUTION - CONSTRUCTION	Quisque LLP	341,000.00 €	193,479.67 €	309,465.00 €	309,465.00 €	37%
STORRS 101 REDESIGN - design	Ut Company	7,500.00 €	5,253.34 €	11,000.00 €	11,000.00 €	52%
FRETWELL MATH DEPARTMENT CAMERAS	Conubia Nostra Per Ltd	0.00 €	1,701.87 €	9,052.50 €	9,052.50 €	60%

- Track your opportunities, cost of sales, delivery costs vs benefit and resources needed to deliver.