New Page

CRM

CRM stands for Customer Relationship Management. CRM software is designed to help business offer an impeccable customer experience, from the 1st prospect interaction to deal closure and beyond. The CRM system can give you a clear over view of the customer/client. One can see everything in one place. A simple customizable dashboard that can tell a customer's previous history, the status of their orders, any outstanding customer service issues and more. Marketers can use a CRM solution to manage and optimize campaigns and lead journeys with a data- driven approach. This helps to ensure that customer needs are at the forefront of business process and invocation cycles.

Though CRM systems have traditionally been used as sales and marketing tools, client service and support is a rising segment of CRM and a critical piece in managing a holistic client relationship. Today's client might have an issue in one channel-say Facebook, and then switch to email or telephone to resolve it in private. A CRM platform lets you manage the enquiry across channels without losing track and gives sales, service and marketing a single view of the customer to inform their activities.

ADVANTAGES OF USING RSOFT:

A Cloud Based CRM Platform offers-----

Faster Deployment.

Automatic software updates.

Cost-effective and scalability.

The ability to work from anywhere, on any device.

Increased collaboration.

ENQUIRY MODULE:

The enquiry module typically refers to a part of the system used for managing and tracking client inquiries. This helps the sales team to manage leads and provide better customer service.

- Enquiry is the first and streamlined process that confirms whether it is a lead that needs follow-ups or a duplicate lead.

- Once Enquiry enters the module it won't be missed at any point of time a quick response will be given without delay.

- Enquires are filtered with the help of CRM for good Lead tracking where the initial point of contact can confirm that.

LEAD MODULE:

Leads are people/client who are in the first stage of the sales process. If they clear the first stage, they become prospects and move on to the second stage of the process.

- When Lead reaches Dashboard, the Lead contact number or mail Id checked whether its New, Re-engaged, or junk lead.

- Leads are differentiated and extracted with various source, Medium.

- Once you start using CRM, leads won't be missed.

- An auto welcome message to the leads via WhatsApp, Email is sent. Also one can send project brochures and location this helps in building trust and increases customer interest.

- Manually adding the lead option and data import options are available.

- The sales team verifies whether each lead is a prospect or a lost lead, thus helping a filtration process.

- Multiple checks are performed to validate the lead, which are based on artificial intelligence.

- The dashboard is set-up with new lead notification and also with follow-up reminders for leads.

CALLS:

The priorities of calls are differentiated, with options being provided based on both incoming and outgoing communications.

Helps in Pre sales team to follow up customer promptly with accurate follow up time with the help of prompt notification.

Incoming call filtration is done based on status. i.e. RNR, CALL BACK, NUMBER BUSY.

Calls are tracked with incoming and Outgoing recordings if needed.

Calls are validated as either new or re engaged as per client requirement.

APPOINMENT:

The appointment management option is given in RSoft CRM dashboard and is flexible.

Automatic appointment remainders can be sent to customers either through Email or SMS.

Appointment gives us a clarity on how many times a client has interacted either online or virtual and same will be updated.

QUOTATION:

Approval will be required for every quote creation.

The quote module offers new options for creating quotes, based on client requirements.

In web and mobile app, quote can be exported in PDF format.

The final pdf can be viewed for quotes. Also a quote can be revised multiple times and tracked.

A predefined list of product details can be created, and options are given for adding new products.

TICKETS:

The option for creating tickets is available on the call ticket form or in an email.

Auto ticket creation Id’s will be sent to customers, either through WhatsApp or email.

The status or priority determines the validation of tickets.

REPORTS:

- Reports can be determined by productivity levels, whether daily, weekly, or monthly and can be viewed and taken source-wise or individual-wise.
- Customised type of report can be done based on client choice i.e. Pie chart or Bar chart.
- Reports can be automatically generated and sent on a daily, weekly, monthly and annual basis, including the financial year report.

STAGES IN LEAD MODULE

The Leads module plays a significant role in CRM software and is primarily responsible for boosting the sales of any organization that uses it. Leads come into the organisation from different medium. **Online medium** such as from Google paid adds, IVR Calls, API portals, Facebook accounts that has different forms to fill data.

Facebook àForms àChabot

àWhatsApp

àEnquiry form.

If there is campaign then it can be carried out in bulk àSMS

àWhatsApp

àEmail.

Offline medium such as hoardings, Broachers, Posters and Banners, News Papers, Pamphlets, Referrals.

Whenever a NEW ENQUIRY comes the lead status will be NOT ATTEMPTED.

If the client Attends the Call, then the lead status will be FOLLOW-UP.

Once the Follow Up is completed then the lead status will be DEMO CONFIRMED.

Once Demo Completed and share prospect then the lead status will be PROPOSAL SENT.

If the order is taken, then lead status will be CLOSE TO WON.

If order not interested, then lead status will be CLOSE TO LOOSE.

It can be also said as some reasons for LOST LEAD are said as the sub status. They are

The fields given in our CRM are shared below in the pictorial representation. Fig1.1, Fig1.2, Fig1.3 are the images of fields given by RSoft for a lead module.

Fig1.1: Fields given in Lead Module

Fig1.2: Fields given in Lead Module

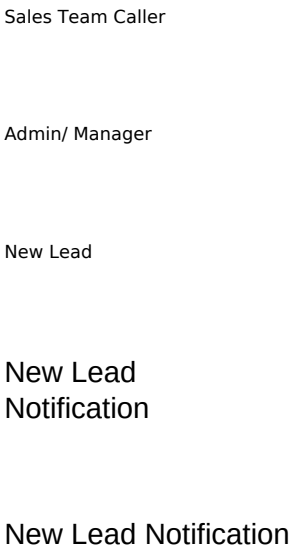
Fig:1.3: Fields given in Lead Module

NOTIFICATION:

Notification plays a vital role in the lead module. Any major event that takes place in lead module needs to be notified either to the tele-caller user as well as to the manager or admin. Some existing notification are as follows.

New Lead Notification

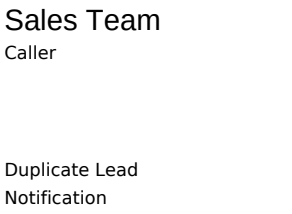
The purpose of a new lead notification is to ensure that the sales team can promptly follow up with the lead and begin the process of nurturing them through the sales funnel. It allows the team to respond quickly to the lead's inquiry or expression of interest, increasing the likelihood of converting them into a paying customer.



Whenever a New lead enters into the system a notification will be sent to the sales team tele caller and also to the admin. The notification to admin can be removed based on the requirement.

Duplicate Lead Notification

plicate Lead Notification



The purpose of a duplicate lead notification is to prevent redundancy and ensure data accuracy within the company's CRM (Customer Relationship Management) system or lead database. Whenever a Duplicate lead enters into the system a notification will be sent to the sales team caller and also to the admin. The notification to admin can be removed based on the client requirement.

Upon receiving a duplicate lead notification, the appropriate team member can review the existing record and compare it with the new lead's information to determine if they are indeed duplicates. If confirmed, they can merge the duplicate records, update any relevant details, and ensure that all interactions and communications with the lead are consolidated under a single, accurate record.

Re-Engage Lead Notification

Re-engage typically involves reaching out to those inactive leads with targeted efforts to reignite their interest and encourage them to re-engage with company's products or services. Once a lead has been successfully re-engaged, then they can be moved back into the active pipeline, where sales team efforts can continue to nurture them towards conversion. Re-engaging with leads can be a valuable strategy for maximizing the potential of your existing lead database and converting previously overlooked opportunities into customers.

Re-engage Lead Notification

Sales Team Caller

Re-engage Lead Notification

Sales team want a re-engaged notification to be popped up to the respective sales tele caller team member.

Not Attempted Notification

Leads are often distinguished based on their stage in the sales pipeline. A lead in “not attempted” status signifies that no effort has been put forth to initiate contact with the lead through methods such as phone calls, email, or other communication channels, with the intention of converting them into a customer.

Not-Attempted Notification

Not attempted lead suggest an opportunity for the sales team to engage and nurture the leads through sales funnel. The lead may be contacted with personalised messages, giving information about the product or service that is relevant to them, and eventually encouraged to become a paying customer.

Not Attempted
Notification

Sales Team Caller

Not Attempted notification need to be triggered when a not-attempted lead enters the lead module. Here the sales team want to get notification for the not attempted lead from the online to the assigned user of sales team for further actions.

Follow up Lead Notification

Effective follow-up with leads requires persistence, patience, and a personalized approach tailored to the individual needs and preferences of each prospect. Follow up leads can be converted into satisfied customers if sales representatives stay engaged and responsive throughout the sales process.

Follow up Notification
(date & Time)

Follow up
Message

Sales Team Caller

Whenever a lead needs to be follow up with the help of scheduler we can set reminder via work flow. A notification will be popped up for the sales tele caller with a message that follow up lead at respective time and date. Based on the desired condition the notification can be set either before 15min, or 1hr or day.

Lost Lead Notification

Lost lead notification is triggered when a lead reaches a point in the sales process where it becomes evident that the opportunity to convert them into a customer has been lost.

Lost Lead Notification
(Online & IVR)

Lost Lead
Message

Sales Team Manager

Here the **sales team Manager** want to get a lost lead notification on losing the lead that are coming from **ONLINE and IVR**.

Upon receiving a lost lead notification, the sales team may conduct post-mortem analysis to evaluate what factors contributed to losing the lead and determine if there are any lessons to be learned or adjustments to be made in their approach. This analysis can help refine sales tactics, improve customer engagement strategies, and ultimately increase its conversion rates in the future. By effectively managing lost lead notification and learning from them, company can turn what might initially seem like a setback into an opportunity for growth and continues improvement in their sales and marketing efforts.

Demo Confirmed notification

Demo Confirmed
Notification

Once all the stages of sales are completed it means it is in last stage of sales i.e. close to won. Here the confirmed lead books for demo of the application to use for further discussion.

Demo Confirmed
Message

Sales Team Manager

Here the sales team manager wants a notification to be triggered once the demo is confirmed from the client.

Dash Board Filters for Lead Module

The Dashboard filter is a feature within a CRM system that allows users to refine the data displayed on their dashboard. It's an essential tool for managing and analysing customer data effectively. Users can customize filters according to their specific needs. It refers to a functionality that allows users to refine and customize the data displayed on their CRM dashboards. These filters are critical tools for users to gain specific insights, focus on relevant information, and make informed decisions based on segmented data. They enhance usability and flexibility, enabling users to extract meaningful insights from complex datasets more efficiently.

Fig 1.4: Pictorial representation of dash board filters.

The sales team dashboard filters need the following filter fields to be display on their dash board.

All Leads: This gives the number of leads available.

Hot Leads (Website and Google): "Hot leads" typically refer to potential customers or prospects who are highly likely to convert into paying customers in the near future. Here Sales team want hot leads from google and website to be monitored.

Previous Month Leads: This gives the number of leads we had in the last month.

Not Attempted Leads: "Not Attempted leads" refers to potential customers or prospects who have not yet been contacted or engaged by the sales or marketing teams. These leads may have been generated through various channels. By having an easy to access count the team can make necessary actions to make it into hot lead.

Lost Leads: "Lost leads" refer to potential customers or prospects who were initially engaged by the sales or marketing teams but did not ultimately make a purchase or take the desired action, resulting in the loss of the opportunity. Here The team want to know the count and detail about the lead lost and to take necessary action so that the count of lead lost can be reduced.

Today's Follow Up: Following up with leads is a critical step in the sales process to nurture relationships, build trust, and ultimately convert prospects into customers. Having this filter on dashboard helps to track about follow ups and take valid actions to make them hot lead.

Missed Follow Up: Missed follow-ups occur when sales or marketing teams fail to engage with leads in a timely or effective manner. This can happen due to various reasons, such as oversight, lack of resources, or inefficient processes. This filter helps to track the missed follow ups and also to take necessary actions so that the count can be made as 0 and to have a strong sales team.

User Rules:

In a sales team, tele callers play a crucial role in reaching out to potential customers, nurturing leads, and driving sales. Establishing clear rules and guidelines for tele callers helps ensure consistency, professionalism, and effectiveness in their interactions with prospects. One such rule is no visibility of leads of tele caller to other.

This can be achieved in roles.

Fig 1.5: Screen shot of user viewing Rule. The arrow points at option to choose.

Go to CRM Settings -àRoles-àClick on particular Tele caller role created à In Can assign records to choose as Subordinate role. By doing so one tele caller leads won't be visible for other caller.

REPORTS

Sales reports provide valuable insights into the performance of a sales team, helping managers understand key metrics, identify trends, and make informed decisions to improve sales effectiveness. The sales team want to get the following reports for better understanding and to improve in performance.

1. **Daily Data Report:** The sales team manager should get report on today how many leads came within the system. This report he should get tele caller wise.

2. **Daily Report Source Wise:** The team manager should get report regarding the leads coming from different source.

3. **Daily Status Wise Report:** The team manager should get report based upon the lead status.

4. **Hourly Performance Report User Wise:** The manager should get report about the tele caller based upon the hourly performance. This helps the manager to monitor User Wise insights into the sales activities and performance of individual sales team members on an hourly basis. This may include key performance metrics such as:

    - **Number of calls made.**
    - **Number of emails sent.**
    - **Number of meetings scheduled.**
    - **Number of deals closed.**
    - **Total revenue generated.**

    By providing users with insights into their hourly performance, this report can help sales team members optimize their time management, identify peak productivity hours, and make data-driven decisions to drive better results.

Appointment Module

An appointment module is a component of a software system, often found in customer relationship management (CRM) platforms, designed to facilitate the scheduling and management of appointments or meetings. The appointment module typically offers features to streamline the process of booking,

organizing, and tracking appointments between individuals or groups.

Fig 2.1: Pictorial representation of Attendance module fields given.

Features and Functionalities of an Appointment Module:

- **Appointment Scheduling:** Users can schedule appointments or meetings with clients, customers, colleagues, or other stakeholders. They can specify the date, time, duration, location, and participants for each appointment.

- **Automated Reminders:** Automated reminders are sent to participants prior to scheduled appointments to ensure they are aware of the upcoming meeting and reduce the likelihood of no-shows or missed appointments. Reminders can be sent via email, SMS, or in-app notifications.

- **Appointment Confirmation:**Confirmation messages or notifications are sent to participants once appointments are successfully booked. Participants may be required to confirm their attendance or reschedule if necessary.

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- **User Access Control:** Role-based access control ensures that only authorized users have permission to schedule, modify, or cancel appointments. This helps maintain data security and prevent unauthorized access or tampering.

Overall, an appointment module streamlines the appointment scheduling process, improves coordination and communication between stakeholders, and enhances the overall efficiency and productivity of an organization.

Notifications

1. Demo Confirmed Notification:

Whenever a demo is confirmed from the client side a notification to be sent to client, sales manager and also to the assigned to caller with the following msg.

“Thank you for confirming the demo with RSoft

ON Date: _____ and Time: _____”

Demo Confirmed Notification

Sales Team Manager

Client

Sales Tele Caller

Notification message

Notification message

Notification message

2. Demo Completed Notification:

A "Demo Completed Notification" is a communication sent to relevant parties within an organization to inform them that a product or service demonstration has been successfully conducted with a client or prospect. This notification serves as an important milestone in the sales process and ensures that all

stakeholders are aware of the progress made in engaging with potential customers. Once the demo is completed from sales team and to the client then a notification need to be sent to the manager, client and the assigned caller with the following msg.

“Thank you for completing the demo with RSoft

ON Date: _____ and Time: _____”

Demo Completed Notification

Sales Team Manager

Client

Sales Tele Caller

Notification message

Notification message

Notification message

3. Appointment Date and Time Notification:

An "Appointment Date and Time Notification" is a communication sent to individuals involved in an appointment to confirm the scheduled date, time, and details of the appointment. This notification serves as a reminder and ensures that all parties are aware of the upcoming appointment. The message should go in the morning by 7 A.M. The message is as follows-

“Your Appointment with RSOFT

ON Date: _____ and Time: _____”

Appointment Notification
Client
Sales Tele Caller
Notification message at 7A.M

Notification message at 7A.M

By sending an appointment date and time notification, you ensure that all parties involved are informed, prepared, and ready to participate in the scheduled appointment, thereby facilitating effective communication and collaboration.

4. Demo Date and Time Notification:

Demo Date and Time Notification can be given for various purposes, including:

Training Sessions: For training programs or workshops conducted online or in person, setting a demo date and time notification can help participants remember when sessions are scheduled to begin.

Meetings and Appointments: Individuals or teams can set demo date and time notifications to remind them of important meetings, appointments, or deadlines.

Personal Reminders: Individuals can use demo date and time notifications as personal reminders for tasks, events, or activities they don't want to forget.

Product Demonstration: In software development or product showcases, a demo date and time notification can be set to remind developers or presenters of when they need to showcase their work to clients, stakeholders, or the public.

Demo Date &Time
Notification Before 1Hr

Sales Team
Manager

Client

Sales Tele Caller

Notification message

Notification message

Notification message

. This notification serves as a reminder and ensures that all parties are aware of the upcoming appointment. The message should go Before 1Hr of the meeting. The message is as follows-

“Your Appointment with RSOFT

ON Date: _____ and Time: _____”

Dash Board Filters for Appointment Module:

Dashboard filters can provide users with greater flexibility and control over managing appointments, leading to improved productivity and user satisfaction.

Total Number of Appointment: This filter helps to easily access the total count of appoint done.

This month Demo Completed: This gives the user a count on demo completed for the respective month.

Previous Month Demo Completed: This gives the user a count on demo completed for the respective Previous month.

Today Demo Confirmed: This gives the count to the user about number of demo completed for the day.

Total Demo Completed: This filter gives easy access to count and details on the completed demo.

Reports:

Daily Report on Today Demo Completed:

"Today Demo Completed Report" provides real-time insights into the performance and effectiveness of demo presentations, facilitating data-driven decision-making and continuous improvement efforts within the organization.

This report needs to be generated daily in the evening 7P.M. This report to be sent to the sales team Manager only.

Daily Report on Tomorrow Demo Confirmed:

"Tomorrow Demo Confirmed Report" helps streamline logistical planning, improve time management, enhance customer engagement, mitigate risks, and facilitate data-driven decision-making for organizations conducting demo presentations.

This report needs to be generated daily in the evening 7P.M. This report to be sent to the sales team Manager only.

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