

## Converting Leads to Deals

Businesses must have information about customers from its various channels. Information right from order initiation upto customer service call history. An effective Customer Relationship Management tool allows you to utilize the modern technology to collect, collate and process this essential information. It allows you to provide better, efficient, personalized, high-quality service to your customers.

- Sales force Automation
- Campaign & Marketing Automation
- Customer Service & Support
- Contact Management
- Customer Intelligence Management
- Efficient tracking of customer details
- Attract new customers through better relationship
- Reduce customer turnover
- Improve Marketing & Sales processes



## Product Description

ANGLER CRM, an easy-to-use, end-to-end Solution for automating the Sales Process of your Organization designed for the Web. Customer Relationship Management (CRM) is the overall process of Marketing, Sales and Service & Support within any Organization. Our CRM Package comprises of three key functional areas.

- Marketing Automation
- Sales Force Automation
- Customer Service & Support

## Marketing Automation

Marketing Automation helps to target the 'Best Customers' by managing Marketing Campaigns to generate Quality Leads.

Marketing Automation comprises of two key functional areas:

### Campaign Management

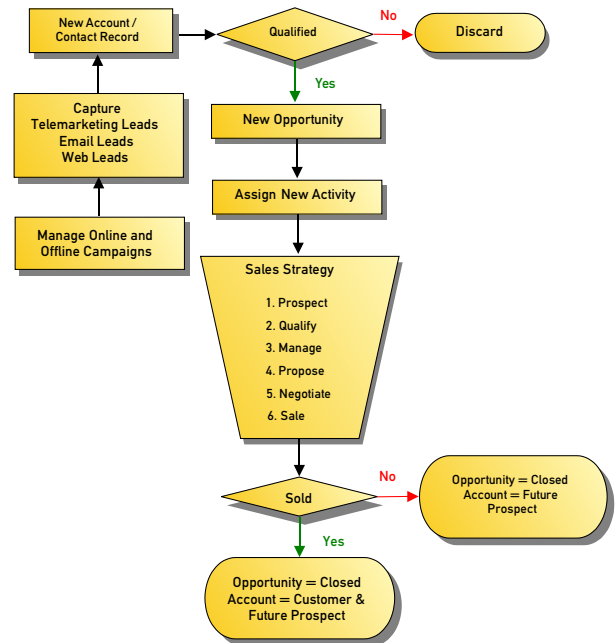
- Allows you to maximize the return on your marketing investment with detailed tracking and reporting that provide precise measurements as to what marketing campaigns are in progress, how they perform, and the types of leads they attract.
- Trade shows, direct mail, advertising, and promotions can all be tracked, analyzed, and optimized so that your marketing efforts are focused on the most effective campaigns.

### Lead Management

- Provides sales executives instant access to the latest prospects and provides that no leads are dropped.
- Automatically import customer information from forms on your Web site into ANGLER CRM so you can instantly capture leads and route them to the executives appropriately.

## Business Process Flow

The general Sales Process involved right from Managing Campaigns, Capturing Leads and towards Closing the Opportunity is shown pictorially.



## Sales Force Automation

Sales Force Automation support the selling process from Lead Qualification to Closing the Business

Sales Force Automation comprises of the following key functional areas:

### Account Management

- Get a complete 360-degree view of your customer relationships. Provides instant, company-wide access to detailed and integrated account data, enabling you to maintain a deeper knowledge of key accounts and facilitate collaboration between sales, service, and marketing teams.

### Opportunity Management

- Enables sales teams to work together to close accounts faster by providing a single place for updating and tracking all opportunity-related information.
- Track stage history and determine the cause of downgraded sales opportunities.

### Contact Management

- Get a complete 360-degree view of your customer relationships.
- Provides instant, company-wide access to detailed and integrated contact information, enabling you to maintain a deep knowledge of key contacts and facilitate collaboration between sales, service, and marketing teams.

### Activity Management

- Allows sales teams to schedule activities for the opportunities related with the respective Account and Contact.
- As all account-related activities are tracked and managed with clearly defined ownership and accountability, you can easily increase the efficiency of your sales team and ensure timely follow-up with your prospects and customers.

### Reporting & Analysis

ANGLER CRM provides a wide variety of reports for Campaigns, Leads, Accounts, Contacts, Opportunities, Activities, Reports, Forecasts, Cases and Solutions like

#### Account and Contact Reports

- Activities - What are my open/completed activities?
- Active Accounts - What are my current accounts?
- Neglected Accounts - Which accounts need attention?
- Account Owners - Who owns what type of accounts?
- New Accounts - What accounts have been added recently?
- Mailing List - Who are the contacts at my current accounts?

#### Opportunity and Forecast Reports

- Opportunity Pipeline - What are my upcoming opportunities by stage?
- Opportunities by Type - What types of opportunities are available by Type?
- Opportunities by Category - What types of opportunities are available by Category?
- Opportunities by Industry - What types of opportunities are available from various Industries?

- Opportunities Bottle necks - Where are my opportunities getting stuck?
- Opportunity Sources - What sources are my opportunities coming from?
- Closed Opportunities - From what opportunities have been won?
- Opportunity History Report - Show us the lifecycle of my opportunities.
- Details of Downgraded Forecast - Show us what opportunities have been downgraded in my Forecast
- Opportunity Stage-Duration Report - Show us a how long an opportunity spent at each stage.
- Quarterly Forecast Summary - Show us the minimum forecast amounts, best forecast amounts and pipeline by quarter.
- Forecast History Report - Show us the lifecycle of my forecasts.

#### Sales Reports

- Target vs. Actual - Compare my quarterly target with actual sales.
- Sales by Account - Which accounts are responsible for sales?
- Sales by Executive - What are my closed sales by various executives?
- Sales by Lead Source - How much revenue is generated by each lead source?

#### Lead Reports

- Lead Lifetime - Track the life of a lead from creation to closure.
- Neglected Leads - Which leads need attention?
- Lead Status - What is the status of all leads?
- Leads By Source - How effective are all lead sources?

#### Support Reports

- Total Cases Created - How many total cases were created?
- Total Cases Created by Executives - Who is creating cases?
- Total Open Cases by Executives - Who owns open cases?
- Solution List - What are the Solutions for my organization?



### Campaign Reports

- Campaign Call Down Report - Show us all members of a specific campaign.

### Revenue Forecasting

- Provides accurate, timely forecasts of revenue and customer demand, enabling managers and executives to help the sales organization close more deals, bring higher profits to the company, and align expenses with revenue growth.

### Customer Service and Support

- Resolve customer service issues after the sale responsively, building customer satisfaction and loyalty.

Customer Service and Support comprises of two key functional areas:

#### Cases

- Enables customer service & support teams to track every interaction with each customer and surpass your most ambitious quality-of-service or productivity goals.

#### Solutions

- Enables your company to capture, maintain and grow a centralized database of Solutions to retain organizational expertise and leverage knowledge across the enterprise.

### Administrative Features

The Administrator Features of ANGLER CRM are as follows

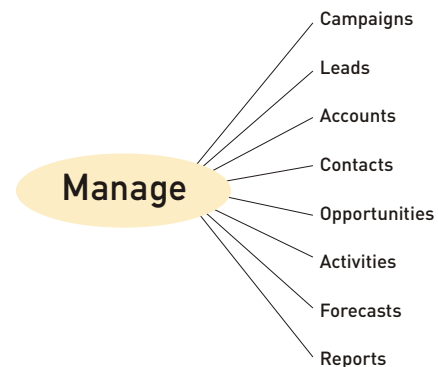
- Manage Groups / Divisions - Manage Groups / Divisions of your Organization
- Manage Geographic Locations - Manage Geographic Locations of your Organization
- Define Role Hierarchy - Define / Manage the Roles and the Levels for the Roles involved in your Organization
- Manage Users - Add Users for your company with the Group / Division, Geographic
- Location and assign an User to whom he / she is reporting to. This will set the privilege for that User. There is also a provision to activate / deactivate the user.
- Manage Opportunity Categories - Manage the

Opportunity / Solution category which the company deals with.

- Manage Industries - Manage the type of industries which the company deals with.
- Manage Currencies - Manage different types of currencies with their conversion rates if the company deals with different types of opportunities with different countries.
- Edit Home Page Messages & Links - The administrator can display his / her company's News and Promotions and a link to the detailed News section. Useful links can be displayed in the Home Page in addition to the News and Promotions.
- Lead Settings - In Lead Settings, Lead Assignment Rules can be defined to capture the Leads from the Web, Imported Leads, Telemarketing Leads and assign the Leads to the appropriate executives automatically. A default Lead owner can be set if the Lead Assignment rule fails to locate a Lead Owner.
- Change Password - Provision to change the Administrator password.

### Privileges

- The Privileges for various users in the company are set according to the Role Hierarchy, Groups / Divisions, Geographic Location and the Reporting to Senior Executives.
- The Features that all the Users have based on their Privileges in the Company are as follows



### Benefits - ANGLER CRM

- Very cost-effective model with high Return On Investment (ROI)
- Manage Customer Relationships in a Prompt and Profitable manner
- Availability 24 x 7
- Easy-to use
- Instant Deployment
- Complete accessibility
- Secure, Scalable and Reliable.

### Total Design Solutions

- Supply Chain Management Solutions
- e-learning Solutions
- Customer Relationship Management Solutions
- Business-to-Business and portal Solutions
- Process Monitoring Solutions
- Online Order Processing Solutions
- Intranet Applications
- Logistics Solutions
- Business-to-Customer (B2C) Solutions
- Knowledge Management Solutions
- Content Management Solutions
- Online Data Transfer System

### Why ANGLER?

- 7+ years & 150+ professionals
- 20,000 sq. ft. delivery centre
- Offices in US, UK and Dubai
- Clients in 14 countries
- ISO 9001 quality-certified

### ANGLER Advantage

- Full Service Provider Model
- Domain Knowledge
- Project Execution
- Vast Experience
- Quality Solutions
- Research and Development



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