

Growth Is Synonymous to Customer Delight...

# Sales Mantra

ON DEMAND CRM SOLUTION



[www.SalesMantra.com](http://www.SalesMantra.com)

## Sales Mantra On Mobile

Put your workplace in your palm and stay connected to your business wherever you go....

Search/Add Enquiry

You are able to add / search new enquiry and fetch information easily.

Things to Do

View your daily schedule/tasks and update them.

Complaint Management

It Increase customer satisfaction by viewing customers complaint, update it after resolving from client site itself with clients signature.

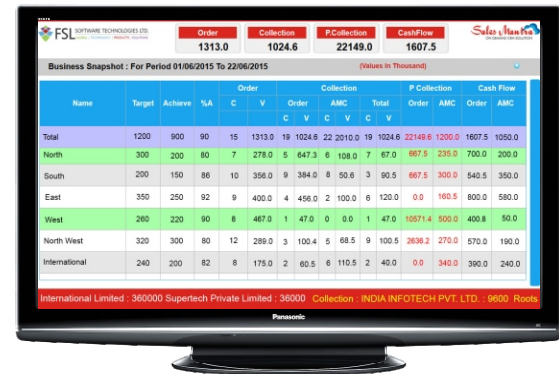
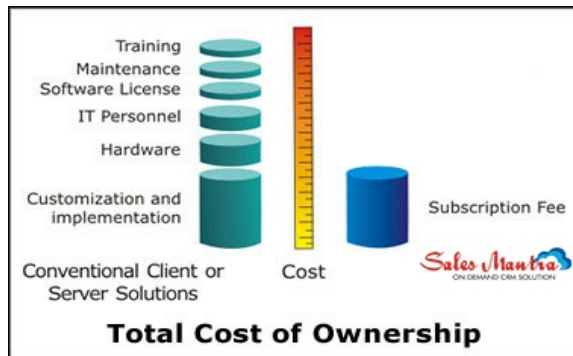
Alerts and Reminders

Quickly response to sales call by getting important.



## Why Sales Mantra

- Large Customer Base and Credentials
- Domain Knowledge-Subject Knowledge for the solution
- Stability-An organization to stay for long in Business
- Quality Delivery-Quality products & services in time
- Support-The prompt After Sales Support makes Technology Work
- Cost Competitive-Value for Money



## Business Snapshots on TV for management

Sales Mantra is available on low cost subscription model scalable, with free upgrades & flexible licensing.

## Sales Force Automation

## Sales Call Management

- **Enquiry:** Capture enquiries from website / SMS / manual, followed by proper allocation to Sales Executive.
- **Customer Follow Up:** A detailed track of the history of communication with customers remains available to avoid any communication gap.
- **360° View:** Get overall details of the customer at a centralized place.
- **Communication within Team:** Improve collaboration within team to increase reach and reduce cost of sales.
- **Avoid Duplicity:** Removes redundancy from the sales cycle.
- **Time Management:** Reduce non selling time of the sales person.



## Activities and Plan

- **Quick Planner:** A real time work schedule is generated on the basis of hierarchy using which seniors can see juniors plan, assign tasks to them and check their status.
- **Monthly Task Calendar:** See a birds eye view of your team and plan yours and their tasks accordingly.
- **Pending Tasks:** Track missed follow-up and its status.
- **Expense:** Expenses like travelling / accommodation etc. can be entered in system. Later, expense reports help to verify and reimburse them.

## Marketing

- **Campaigns:** Email and SMS campaigns to create awareness.
- **Competitor Analysis:** Maintains the records of the existing competitors or potential threats.
- **Reminders:** SalesMantra gives you timely alerts and reminders for birthdays / anniversaries to strengthen your business relations with your clients.
- **Win/Loss Analysis:** Industry Wise / Product Wise Business Potential can be analyzed.
- **Centralized Depository:** To eliminate bulky sales / product files.



**Feedbacks** Get alerted for the urgent calls and enquirers.

**Scheduler** Get your favorite reports in your mail box on desired schedule and time.

**Newsletters** Share the news regarding achievements.

**DCR** Get the status of Plan Summary and Work.

## Alerts & Reminders

### Finished Goods Stock

- **Product Stock:** Check the real time status of the stock of your products at your multiple branches.
- **Expiry Report:** Get the serial no.wise product expiry report to dispatch those goods first which are about to expire in the nearest future.
- **Dispatches:** Check the status of pending dispatches and plan the deliveries cost effectively.
- **Orders:** Reports are generated on borders and revenue like Employee Wise / Branch Wise / Product Wise / Lead Source Wise etc. For field representatives, option to add quick order is given which is accessible on mobile.

### Contact Management

- **Contacts:** A centralized depository is maintained which can be filtered on various grounds like location wise / group wise / industry wise / source wise.
- **Business Cards:** SalesMantra CRM allows you to print business cards and label of a huge database; which in turn, can be used for sending hard copy mailers.
- **Important Dates:** Reminders for birthdays / anniversaries remains available to strengthen the relations.

### Projections / Proposals

- **Sales Forecasting and Funnel Management:** System generates a funnel to help management to identify the calls which are at a specific stage like Negotiation or Finalization etc.
- **Quotations:** Quick quotation submission and tracking the orders received against the quotation sent.
- **Target v/s Achievement:** SalesMantra allows defining the targets on different basis like Value Wise / Quantity Wise / Customer Wise Appointment Wise / Enquiries Wise etc. Management can see the progress on these defined targets on any given point of time.

## Service Management

### Installation Management

- **Allocation:** The work load of engineers is considered while allocating installation. The site location, engineer skill set etc. is also considered by system prior to allocation of an installation.
- **Pre-Installation:** System helps to identify the sites requiring pre-installation work.
- **Installation History:** Keep a track of complete history of the visits / follow ups of engineers till completion.
- **Status Check:** Service Head / Management can check the status of each installation segregated on the basis of Location / Skill-set etc.

### AMC / Service Orders

- **AMC Target V/s Achievements:** Keep a real time track of targeted AMC against acquired AMC to take timely actions.
- **Service Contracts:** On time alerts and informative reports are available to renew contracts on time and avoid any revenue loss.
- **AMC Order v/s Service Costs:** Analyze whether maintenance contracts running are cost effective or not and eliminate non-viable service contracts.
- **Cash Flow:** Get a systematic view of revenue resources of near future with drill down facility to see the details.

### Employee Forum

#### Enter Issue / Allocation

Employee can enter their issues and suggestions. Depending upon the nature of issue / suggestion, it is allocated to responsible personnel.

#### Tracking

Management can track the action taken on each issue / suggestion in real time.

#### Maintaining History

Overall history is stored and can be referred instantly whenever required.

#### Nature of Issues / Suggestion

Issues can be filtered on certain criteria so that the concerned person can handle them.

### Key Reports

- Business Snapshots
- Prospects Summary
- Sales Funnel Movement Report
- Value Addition Report
- Sales Projection
- Neglected Calls
- Quotations Sent
- Order Received vs Collection
- Employee Performance
- Inventory Status
- Customer Complaint(s) Status
- AMC Status
- Customer Feedback
- Employee Expenses

### Service Call Management

- **Preventive Maintenance:** Control your service costs and increase customer satisfaction by making timely maintenance visits using system generated PM report.
- **Service Record:** Get a 360° view of service history of the customer and avoid non viable service contracts.
- **Spare Analysis:** Management can identify the spares in demand and create there production strategy.
- **Advance Day Planner:** Service engineer can plan their service calls / visits in advance and get reminded for same.
- **Service Data:** Comprehensive information remains available with management as well as employee which allows accountability and monitoring.

### Customer Feedback

- **Feedback Form:** The feedback form can be designed including required questions in it with a defined weight age to each response.
- **Online Functionality:** Customer can respond online on the feedback form and submit his feedback The next moment his responses are captured in SalesMantra CRM.
- **Satisfaction Scale:** Customer feedback report helps you to identify the satisfaction level of customer and areas of improvement.
- **Service Feedback:** Site engineer can get digitally signed service report using android application.

### Complaint / Ticket Management

- **Complaint Reception:** Complaint can be received in the system via SMS/ Website or manual entry.
- **Allocation:** Service calls can be handled with greater speed. The person with the right skill set is allocated the complaint to avoid situation where multiple people have to be called after examining the complaint.
- **Alerts and Complaint Closure:** Service Engineer is equipped with proper alerts system as soon as he receives a complaint to attend. Then the complaint can be closed in 2 stages, technically and commercially, depending upon the rights of the engineer.
- **Online Tracking:** Customer can see the status of his complaint online using a unique complaint number allotted.

### Project Management

- **Define Task :** While initiating the project You can define task that are required in fulfillment of project.
- **Activities at different project stages :** It helps you Complete your project smoothly by defining every minute activity involved in the project.
- **Increases customer interaction :** Which stage this project is going on and can give their inputs which helps in goods customer interaction.
- **Automate routine task management / alert and status change:** Through this system you can automate your routine task and can get alerts when the stagesof project changes.

## Challenges

## Solutions

High turnover of sales people: Loss of sales opportunities if Sales Rep quits his job.

Attrition in sales force can be managed without loss of business as system having track of each and every sales opportunities including the status of each call and could conveniently switch responsibilities to someone else to take them forward.

No of days spent by a sales recruit to get into the sales process.

Sales rep could get into the sales process day 1.

Multiple approach to a prospect by different divisions/ sales teams within the organization. Person / location specific way of maintaining sales data.

Multiple approach to a prospect by different divisions/sales teams within the organisation are highlighted and controlled, as Sales data being maintained and available centrally and as a standard process/format across the organization.

Focused and effective management of valuable leads to analyze Lead to order conversions/ failure.

Record conversion of lead into salescall and tracks their position in the sale. Alerts / feedback features facilities faster decision making/closure of deals Enables the management to analyze the whole sales process : Suspect -> Prospect -> Follow-up -> Quotation -> Order -> Post Sales Support.

Sales Reports are not up-to-date : Unable to analyze the sales data as quantum of data is huge and enormous time and efforts requires in compilation and preparation of regular review papers in excel.

Real time reporting system Employee performance can be maintained on day to day, weekly ,monthly or yearly on a click of mouse. The real time reports generated by the software such as sales call report, Product Order Report, Employee Target Report, Expense Report etc to analyze product & employee performance.

Facing difficulties in monitoring and reviewing day-to-day sales & service activities.

Creates and manages daily schedule of sales rep activities with alerts for pending work.



## Benefits to Organization

- The software results in reducing the non sales time of the sales team by cutting down/eliminating time spent on report writing /review preparation etc. and converts same to sales time increasing turnover and profits.
- Better coordination within organizations due to easy access to comprehensive information.
- Increase productivity due to reduction in the time spent for filling paperwork and searching for contact details and other information.
- Improve decision making due to availability of timely and up to date information.
- Constant review and tracking possible with the help of detailed reports generated by the software.
- Reduced pain of attrition as sales and service activities can be transferred between employees as a result of transparency within the organization.
- Efficient resources management and planning based on prior knowledge of scheduled activities for the coming months  
Availability of information with clients and employees based on availability of uniform information.
- Faster communication with clients and employees based on knowledge of their particular situation.
- Effective management of teams at different locations based on availability of uniform location.
- Improve sales force casting.

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