Customer Relationship Management-CRM

Take control of your business
Access to every customer history
Personalized sales

WTM SalesGrow CRM

Grow your Sales & Business

An Essential CRM Solution delivery quickly and affordably

SalesGrow CRM

WTM SalesGrow CRM helps organizations differentiate their businesses to achieve maximum top-and bottom-line growth. WTM offers the broadest and deepest portfolio of CRM solutions that address all customer touch-points and provide rich functionality to support the specific business needs for organizations of every size to deliver a superior customer experience.

- You can automate and streamline your full sales process. CRM Software delivers integrated Sales, Marketing, Customer Service and Support automation solutions that adapt to an organizations unique customer acquisition, retention, and development processes.
- CRM application provides a complete CRM solution with smart cost of ownership, rapid time to productivity and high return on investment.

ESSENTIAL FUNCTONALITY FOR SALES AND MARKTING

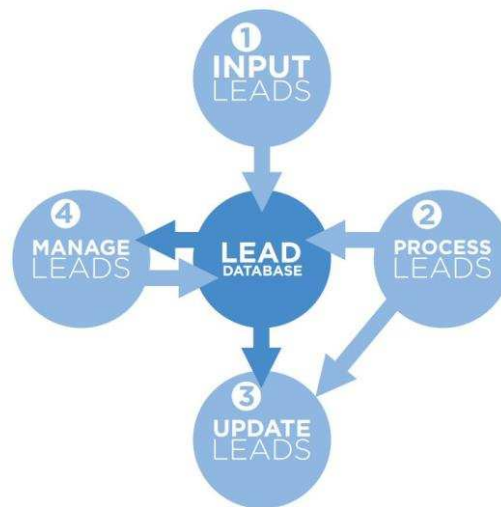# FEATURE THAT HELP YOU ACHIEVE YOUR CRM VISION

WTM SalesGrow

A Powerful Solutions for the sales professionals the WTM SalesGrow Customer Relationship Management rapid – deployment solution has Sales functionality to help you be well prepared for customer meetings, track Progress easily, and positively influence deal closure. The Software helps Managers assign the right reps to the right opportunities, so you team can close deals fast, collect cash quickly and make customers happy.

- Lead Management
- Account and contact management
- Activity management
- Opportunity management
- Pipeline performance management
- Sales reporting

Lead Management

➢ WTM SalesGrow CRM gives you the opportunity to optimize your lead generation process by creating genuine leads that have higher conversion Probability. By automating tasks, managing & categorizing contacts (as per location, industry or source) and sending out regular product information to existing and prospective customers, WTM SalesGrow makes the lead generation procedure highly focussed.

Contact Management

➢ Access critical customer data including key contacts, communication history, and more quickly and easily with WTM SalesGrow you'll get a complete picture of every customer, from social insights to campaign history, to deals they're involved in.

Opportunity Management

➢ Get all the details on all your team's deals — stage, products, competition, quotes, and more. See where leads come from and stay connected to the people and information you need to close every sale.

Account Management

➢ Account management is the process of managing the communications and transactions with businesses having many contacts and divisions. This makes it possible to cater to the needs of specific divisions inside a business. By categorizing contacts to accounts by their sub-divisions and functions, communication is directed to the proper personnel in charge.

Real Time Pipeline Management

➢ Sell on time with real time, personalized access to every deal in the pipeline. Track early indicators and changes impacting your pipeline so you can stay ahead of your forecast, spend time where it counts, and meet your sales targets.

Customer Activity History

➢ Sell proactively and avoid surprises by knowing what matters to your accounts and contacts, when it matters. Know your accounts inside and out with 360-degree customer activity history across the extended selling enterprise. Understand what matters to your key contacts and when to engage with smarter account intelligence based on cross- channel and social media activity.

Sales Analytics

➢ Sell smarter. WTM Sales CRM reporting and dashboards provide you with real-time information about your pipeline, progress to quote, key opportunity and account activity, and reperformance. WTM Sales CRM reports are designed for the end user so every sales team can securely access the insight they need to drive performance.

Task & Activities

➢ CRM's tasks and activities help you know what activities are completed and which activities need to be worked on. Nothing falls through the cracks.

Forecasting Planning

➢ Fast, easy, accurate. Get in-line editing, over ride visibility, multi-currency support, custom forecast categories, and a complete, real-time view in to your team's forecasts.

Approvals and Workflow

➢ Use Visual Workflow to rapidly design and run any business process with drag and drop simplicity. Drive approvals in real-time from your SalesGrow CRM and manage success with flexible Approvals processes for deal discounts, expenses, and more.

Territory Management enables larger companies with a complex sales structure to organize their activities along multiple dimensions. Whether your company organizes sales team based on geography or product lines, Territory Management can handle any customer segmentation.

Product and Price

- Manage organization-wide product catalogue and associate each product catalogue with CRM modules for a 360 degrees view.
- Customize the products page layout, fields, and related list views as per your organization's requirements.
- Create multiple Price Books as per customer segmentation and associate products with the Price Books.
- Offer flat or differential type volume discounts while generating invoices for customers
- Procure products from the preferred list of vendors.

Purchase Order

- Streamline organization-wide procurement and fulfilment processes with an integrated approach.
- Track **outstanding orders** from the Orders list view.
- **Procure products** from the best available Vendors, Manufacturers, Resellers list in SalesGrow CRM.
- Manage up-to-date stock position by seamless integration between order fulfilment and available stock in your warehouse.
- Customize Purchase Order (PO) and Sales Order (SO) templates as per your organization requirements.

Sales Quotation

- Track outstanding quotes from the quotes list view.
- Add line items to the quotes and update subtotal, taxes, adjustments, and grand total amounts.
- Select different prices for the same product as per customer segment.
- Create printer-friendly Sales Quotes and deliver to the prospect customers through inbuilt email service.
- Create Sales Order or Invoice with a single click from the Sales Quote.
- Avoid duplicate work by dynamically displaying the Billing & Shipping addresses and terms. & conditions while creating quotes.
- Customize sales quote templates as per your organization's requirements.

Invoice Management

- ➢ Track outstanding invoices from the Invoices list view.
- ➢ Customize Invoice **print layout** and manage **multiple invoice templates** for different product lines.
- ➢ Add line items to the Invoice and update subtotal, taxes, adjustments, and grand total amounts automatically.
- ➢ Avoid duplicate work by dynamically displaying the Billing & Shipping addresses, and terms & conditions while creating invoices.
- ➢ Send **printer-friendly invoices** to customers using inbuilt email service.

Account and Contact Reports

- ➢ Contact Mailing List
- ➢ Accounts by Industry

Lead Reports

- ➢ Leads from various sources
- ➢ Leads and their status
- ➢ Leads that are created today
- ➢ Leads and the corresponding owners
- ➢ Leads that are converted into Account / Opportunity / Contact.
- ➢ Leads from various vertical industries

Activity Reports

- ➢ Tasks and Events Report
- ➢ Today's at Work

Sales Forecast Reports

- ➢ Quarterly Forecast Summary
- ➢ Forecast History Report

Product Reports

- ➢ Products by Category

Vendor Reports

- ➢ Amount by Vendors
- ➢ Vendors Vs Purchases

Quote Reports

- ➢ Quotes by Accounts
- ➢ Quotes by Stage

Sales Order Reports

- ➢ Sales Orders by Accounts
- ➢ Sales Orders by Status
- ➢ Sales Orders by Owner

Purchase Order Reports

- ➢ Contacts Vs Purchases
- ➢ Purchase Orders by Status

Invoice Reports

- ➢ Invoices by Accounts
- ➢ Invoices by Status

Report as per your Business need you customized Report as required that's helpful for better run your business.

Unique Combination of Business Benefits

The WTM offering delivers a variety of unparalleled benefits, helping you realize your goals for a SalesGrow CRM solution:

- **Robust functionality** – Support for essential sales and marketing process helps you get closer to your customers.

- **Rapid delivery** – Pre configured software can be delivered by WTM Consulting and our reseller partner in as little as immediately.

- **Reduced complexity** – A robust CRM solution from a single vendor, with superior global support, means fewer worries for you.

- **Flexible pricing –** Choose Smart Price monthly rental or a perpetual license model, depending on your business requirements.

Benefits of Sales Grow CRM
- Maximize the value of every sales opportunity in your pipeline.
- Create accurate Quotes and Orders in a couple of clicks.
- Manage collaboration and team selling across your department with ease.
- Eliminate guesswork; make decisions based on accurate, real-time information.
- Empower your team and boost productivity with a single view of leads, opportunities, tasks and activities.
- Enables quarterly sales performance monitoring, improving consistency across the sales organization.
- Maximizes cross- and up-sell opportunities.
- Great user experience on any browser with cross-browser compatibility.
- Reduces time spent in the office on sales administration (more time on sales calls).

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