



Project.Business



Project / Lead acquisition management

- Organization and documentation of your sales project
- Dispatch of tasks with deadlines and reminders
- Complete project history: quotations, documents, reports, e-mails, etc.



Project / Lead acquisition assessment

- Assessment of sales projects
- Representation in a project matrix based on the portfolio analysis of the Boston Consulting Group
- Definable criteria for appreciation and depreciation



Project / Lead acquisition phases

- Structuring of projects according to phases: forecast, calculation, quotation preparation, scheduling and tracking
- Documentation of milestones



Project / Lead acquisition participants

- Linking the appropriate addresses and contacts
- Assignments of responsibilities and roles



Forecast

- Success statistics, calculation
- Forecast per month, quarter, 24 months rolling



Offer preparation

- Template-driven offer preparation
- Storage of templates in your corporate design



Offer variants

- Any number of quotation revisions or variants, e.g., based on the product master, special conditions, assignment of items to quotation categories



Quotation tracking

- Quotation follow-ups and deadlines monitoring
- Sending tasks with deadlines and reminders

Use every chance of success

With SMARTCRM, you know exactly where to start at every stage of your sales project.

Year	Target	Actual	Margin %
2019	1,120,546	418,861	37.4%
2018	612,379	244,977	40.0%
Total	1,732,925	663,838	38.4%

Year	Forecast	Actual	Margin %
2019 Forecast	3,208,000	309	3.9%
2018 Forecast	2,074,013	423	4.4%
2017 Forecast	3,373,514	404	4.7%

Criteria (0)	Appr/depn 1	Reference visit done
4	Appr/depn 2	Budget utilisation
5	Appr/depn 3	No timeline yet
5	Appr/depn 4	Realistic delivery date
5	Appr/depn 5	Appr/depn 6
Total		

Address	Count	City	Description	Pro-No.	EMP.	Phase	Volume	Chance	Value	Invest.	Realization	Type	Start	Main Status	Main Address
TILLEY PACKAGING PLC	1	Derby	Special Machine	10000	PSI	OS	151,330	80	121,229	17,024	2019	Standard	02.07.2019		TILLEY PACKAGING PLC
TILLEY PACKAGING PLC	1	Derby	Special Machine	8002	PSI	OS	33,000	80	14,310	18,690	2019	Standard	28.03.2019		TILLEY PACKAGING PLC

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