



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.

Turnover	CM	Incoming orders	Orders on hand	Open Items	Special Prices	Forecast	Planning	Tickets	Features	Competition	Quotations	Activities
Full forecast financial year												
Forecast 12 months												
Forecast												
Forecast financial year per employee												
Forecast 12 months per employee												
All projects												

Year	Turnover	CM	Incoming orders	Orders on hand	Open Items	Special Prices	Forecast	Planning	Tickets	Features	Competition	Quotations	Activities
2022	147,251	50,413	20,321	19,307	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321
2021	143,835	29,254	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321
2020	488,640	218,414	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321
2019	343,476	150,110	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321
2018	486,217	179,175	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321	20,321

Project Manager	Sandmann Pa - (PS)	Order volume	11,025,2022
Master Data	Evaluation	Request	Milestones
Criteria set	Technically possible	Budget available	Cost are economically
Identified benefits	Defined timeline	Realistic delivery date	Total

Date	Time	Editor	Type	Result	Salutation	Contact	Subject	Next action	On
16.03.2022	12:55	CM	Phone_In	Visit	Mr	Tilley	Operation too expensive?	Phone	01.03.2022
16.03.2022	10:56	PS	E-mail_Out	Quotation	Mr	Tilley	Revised quotation	Phone	20.02.2022
08.03.2022	15:12	PS	Visit	Quotation	Mr	Tilley	Our quotation	Phone	14.02.2022
16.02.2021	14:19	PS	Visit	Order	Mr	Tilley	Discuss about the offer during the visit	Phone	14.02.2022
22.08.2021	12:55	PS	Phone_In	Order	Mr	Tilley	Needs a special machine	Phone	14.02.2022

See our CRM system live – free of charge and non-binding directly on your screen:
smartcrm.gmbh/en/company/online-demo



Head Office: Georg-Todt-Straße 1, 76870 Kandel, Germany, Ph. +49 7275 98866-0, vertrieb@smartcrm.de, www.smartcrm.com

Office in Austria: Friedensstraße 12, 5082 Grödig, Austria, Ph. +43 662 870952-0, vertrieb@smartcrm.at, www.smartcrm.at

Office in Switzerland: Juchstrasse 45, 8500 Frauenfeld, Switzerland, Ph. +41 52 770 00-50, vertrieb@smartcrm.ch, www.smartcrm.ch