



# 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

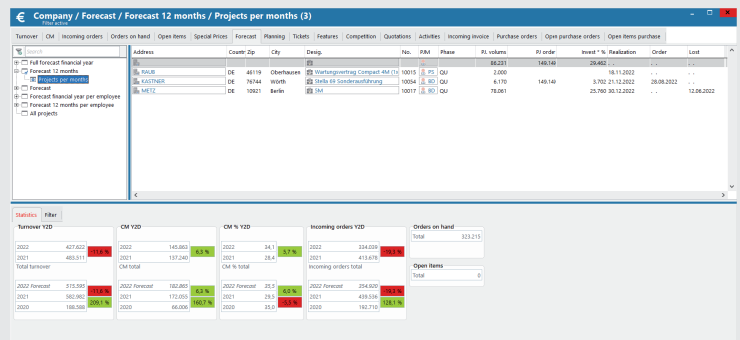
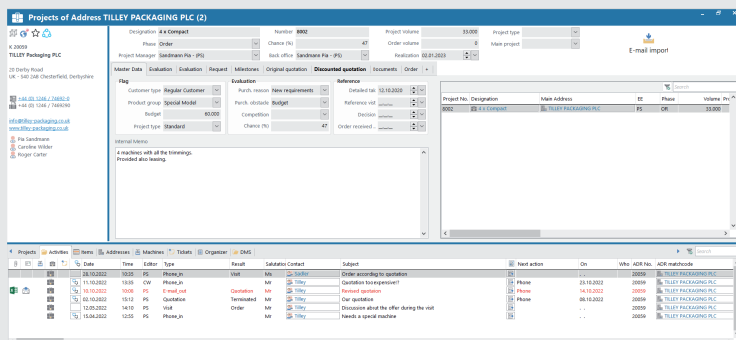


## Quotation tracking

- 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.



See our CRM system live – free of charge and non-binding directly on your screen:

[smartcrm.gmbh/en/company/online-demo](http://smartcrm.gmbh/en/company/online-demo)



Head Office: Georg-Todt-Straße 1, 76870 Kandel, Germany, Ph. +49 7275 98866-0,  
[vertrieb@smartcrm.de](mailto:vertrieb@smartcrm.de), [www.smartcrm.com](http://www.smartcrm.com)

Office in Austria: Friedensstraße 12, 5082 Grödig, Austria, Ph. +43 662 870952-0,  
[vertrieb@smartcrm.at](mailto:vertrieb@smartcrm.at), [www.smartcrm.at](http://www.smartcrm.at)

Office in Switzerland: Juchstrasse 45, 8500 Frauenfeld, Switzerland, Ph. +41 52 770 00-50,  
[vertrieb@smartcrm.ch](mailto:vertrieb@smartcrm.ch), [www.smartcrm.ch](http://www.smartcrm.ch)