



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

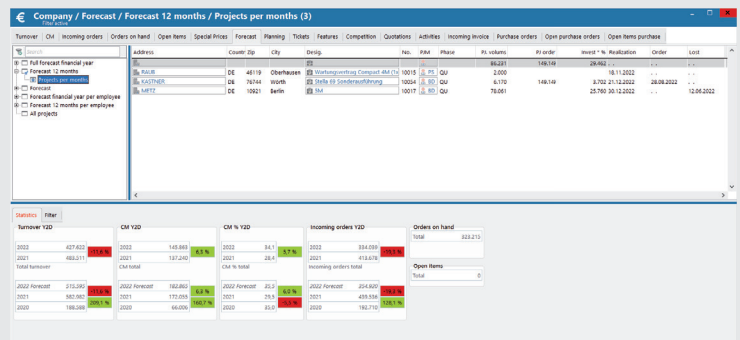
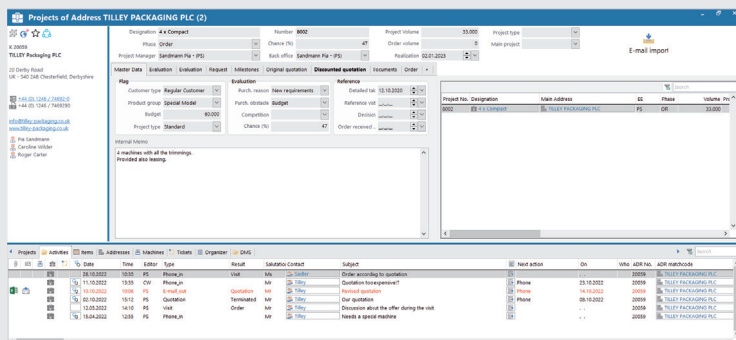


Quotation tracking

- 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



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