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IT to the next level

SkillTech CRM

SkillTech CRM Documentation
Skill Technologies



Planning

Work

Time

Resource

Execution

Support

Work Smarter with SkillTech CRM

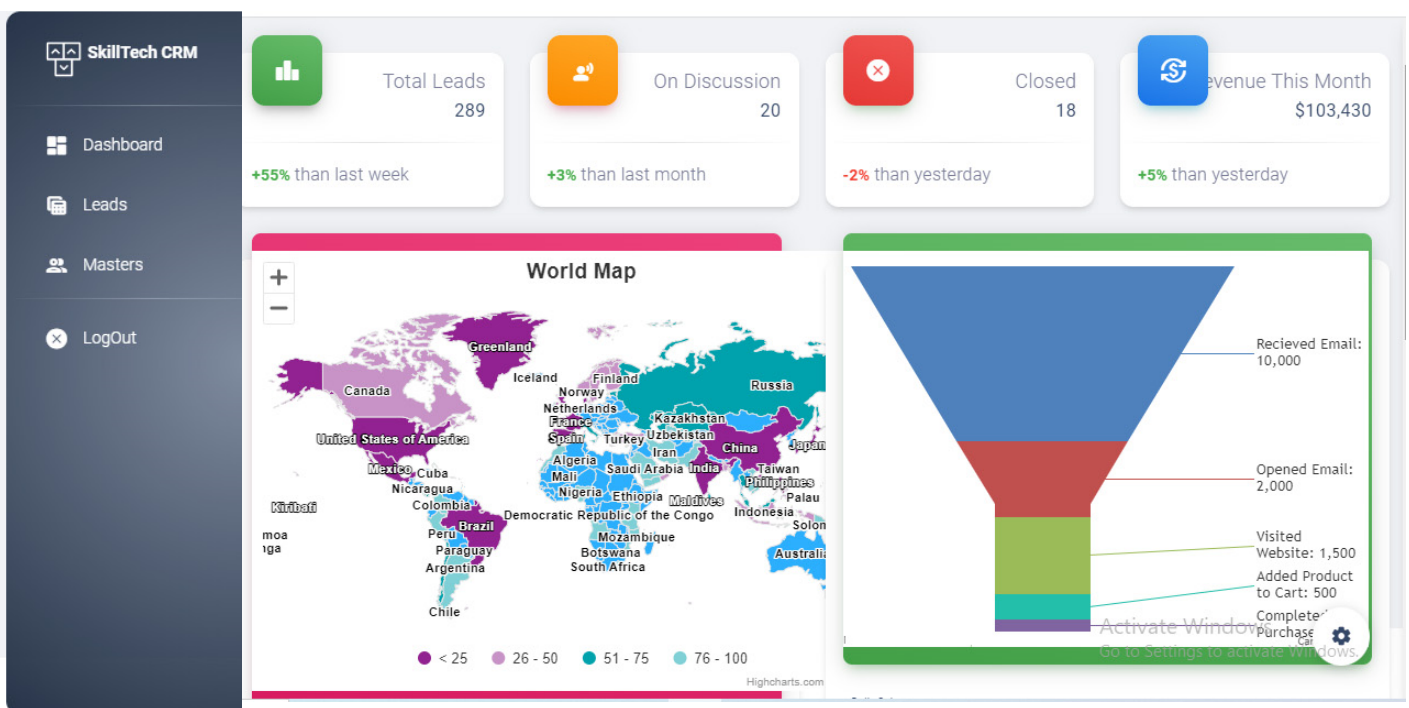


Customer Relationship Management

Whether you are looking to strengthen your client relationships, improve your team's collaboration efforts and overall efficiency, increase your revenues and profitability, decrease client attrition, or engage in any number of other business-building activities, **SkillTech CRM** offers tools to assist in your efforts.

▶ Streamline & Automate Processes

- You can standardize workflows and processes associated with marketing, customer support and sales, and thus improve coordination.



▶ **Make Smarter Offers**

- **Recognize promising leads, concentrate on thousand increase the chances of conversion. Being in close touch with your prospects enables you to understand their needs better so your offers are more relevant.**

▶ **Improve Customer Service**

- **Happy customers are more likely to be loyal customers and come back more often. So, it's of mostly important to know if all of your customers are satisfied. If not, figure out the reasons and fix them. A CRM platform is instrumental in terms of collecting data on customer satisfaction. Some products also incorporate customer service capabilities to further support customers.**



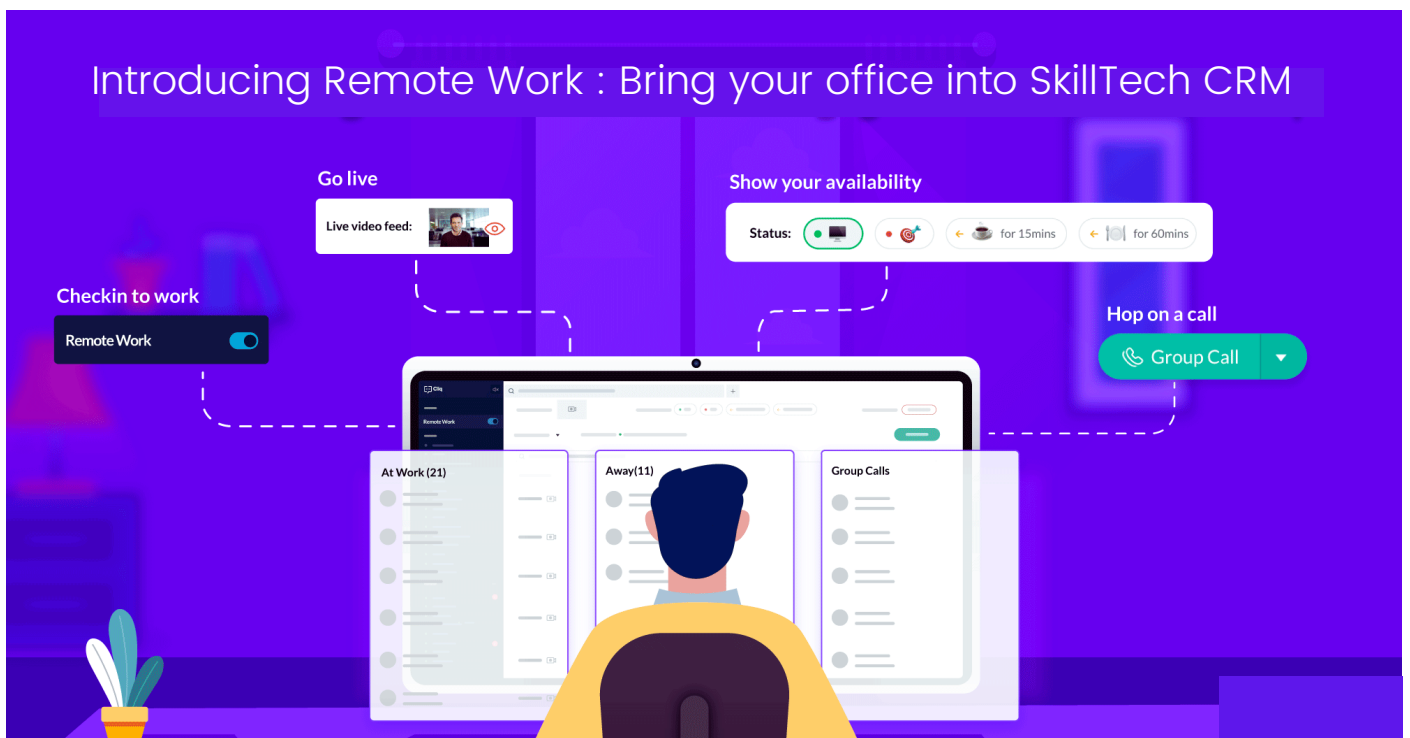
► Increase Sales

- CRM software features let you know important customer data such as birthdays, locations, age and industry, which you can use to personalize communication as well as offerings. With the right offers made to the right customers at the optimal time, you can make better deals, resulting in improved ROI.



► Work Remotely

- **Remotely:** Keep all users on the same page through a cloud-based CRM system. Remote access enables sales reps to check and update data on the go and work from anywhere.



► Maximize Customer Lifetime Value

- **Understand your customers better and identify cross-selling and upselling opportunities to grow long-lasting and profitable relationships.** data on the go and work from anywhere.



► Reduce Costs

You can quickly implement a cloud-based CRM platform without any special installation and hardware requirements, minimizing IT costs and eliminating the need for version control and scheduled updates. CRM pricing is based on the number of users and features needed, making it a cost-effective solution.



▶ KEY FEATURES

The top CRM tools include these key features:

1. Contact Management

Contact management, an element of CRM that sometimes goes by customer management software, is one of the most important CRM functions. It allows users to segment your contacts into groups to organize and better cater to them.

With this CRM capability, you'll be able to gather crucial customer data and bolster your marketing strategies when introducing new products. It also improves the personalization of all contacts with customers, making them feel important and catered to. This is a key factor in customer satisfaction!



2. Sales Team and Customer Opportunity Management

Quantifying the opportunities that your sales team has with customers is a relatively basic feature of CRM. Referred to as lead scoring, it allows users to identify the customers that are most likely to convert. This helps streamline sales/marketing teams, improve efficiency and optimize your sales process.

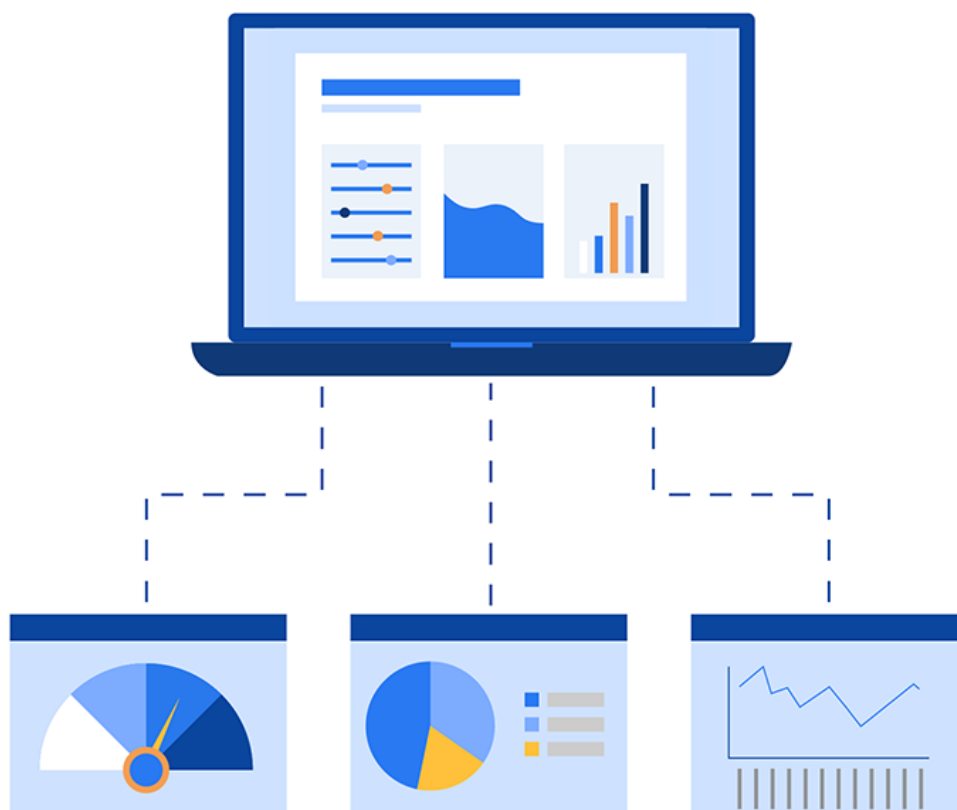
3. Lead Management for Determining High-Quality Leads

No CRM feature list would be complete without mentioning lead management. This technology allows a business to determine the best customers to follow up with based upon demographic and psychographic factors. Like lead scoring, it improves the efficiency and productivity of your sales team by helping them focus on the right leads at the right time.



4. Reports and Dashboards

Once relegated to business intelligence tools, BI, reporting and dashboards have become some of the top CRM features. Users can view statistics in a highly visual, engaging perspective using customized reports and dashboards. They offer real-time data updates and a platform that can be accessed from various portals, improving ease of access for a variety of personnel. Management can use these reports to make data-driven decisions – an investment in CRM BI is an investment in the future of your business.



5. Sales Analytics

On the subject of reporting, sales analytics is one of the most valuable features of a CRM. Users can create better sales campaigns in the future by analyzing the hard data of past campaigns. CRM helps you collect data from social media, polls and website traffic, then analyze it – all with the same software.

6. Sales Forecasting

A large part of customer relationship management is determining a metric for success. Forecasting lets you create a benchmark by which you can determine whether your results are actually on par with your efforts. You can also use this data to determine where you need to direct future efforts.



7. Workflow and Approvals

One of the ways in which your company will instantly increase its efficiency is by optimizing workflows. CRMs can facilitate optimization by automating processes like data collection, data analysis, marketing campaigns and other tasks that were previously done manually. This CRM function offers reporting and analytics to help users identify problem areas in order to improve them.

8. Sales Data

One of the best features of CRM is its ability to organize your sales and customer data into manageable chunks. Once raw data is satisfied, it can be developed into visualizations you need to make decisions. Users are able to quantify KPIs, identify pain points and make data-driven decisions.



9. CRM Data/File Storage

In order to maximize the usefulness of data, it must be properly stored. One of the key CRM functions is a proprietary method of data storage so users can pull up the data in an efficient manner. CRM stores and manages all your sales-related files like proposals and quotes . It also offers safeguards to protect and back up this important data to prevent losses and security breaches.

10. Inside Sales Console

The platform for increasing sales performance through a more efficient UI is known as the inside sales console. CRM systems offer optimized UI and data analytics to further streamline and improve the customer experience .



11. Marketing Automation Integration

Marketing automation allows you to more efficiently and strategically target audiences that are likely to be interested in what you're selling. A good CRM platform will allow you to control the terms of automating parts of your marketing program selectively.

12. Sales Performance Management

Among other CRM features, sales performance management offers a range of benefits to sales teams. Managers can easily see what aspects of the sales team are performing well and which need improvement. Data can be organized by sales rep or by other quantifiers. You can manage the performance of sales partners from the platform to ensure your team is performing at its best. By identifying problem areas with concrete data, they can be more efficiently addressed.



13. Product Level Quotes

A CRM functions as an inventory database for your products. Keep up with quotes for the products that you sell individually. Find out which products are doing well with customers and where sales are lost.

14. Role-based Views

For added security, you can restrict your employees' access based on their role in the organization. Control what different users see within your CRM to prevent data leaks and security breaches. This CRM function allows you to manage your employees' activity based on level and keeps your customers' data safe.

15. Customization Options

Customization is one of the more basic CRM features, but it has far-reaching implications. The more customization, the more flexible the CRM. It's crucial to know your needs when it comes to customization before making a purchase.



16. Customer Service Automation



As the name states, CRM software is about managing relationships with your customers. Users can manage each customer case individually to improve customer satisfaction levels and track, close and reopen existing cases. It delivers automated services to personalize client communications. You can create a consolidated knowledge base of support information for quick access.



17. Tracking



This CRM feature helps you keep track of customer journeys from the first point of contact to purchase and after-sales interactions. You can also monitor business-specific metrics like lead source, win rate and customer lifetime value.



18. Project Management

Missing meetings is such a bummer, right? Instead of jotting down important dates in an Excel spreadsheet, CRM's project management capabilities make it easy to manage meetings with clients.

With real-time alerts, you stay in the loop for upcoming events as well as any changes made to sales documents by your team members. This CRM function lets you quickly overview your pending projects, so you don't miss any deadlines.



19. Territory Management

You can route leads and accounts according to the customer's location. CRMs let you segment accounts based on "territories" – geographical location, product type or even industry. This CRM software feature helps create hierarchies based on countries and cities.

Organizing accounts in territories lets you easily view which sales reps are assigned to which region. It makes tracking easier and enables you to compare performance based on different locations.

20. Pipeline Management

You can route leads and accounts according to the customer's location. CRMs let you segment accounts based on "territories" – geographical location, product type or even industry. This CRM software feature helps create hierarchies based on countries and cities.

Organizing accounts in territories lets you easily view which sales reps are assigned to which region. It makes tracking easier and enables you to compare performance based on different locations.





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