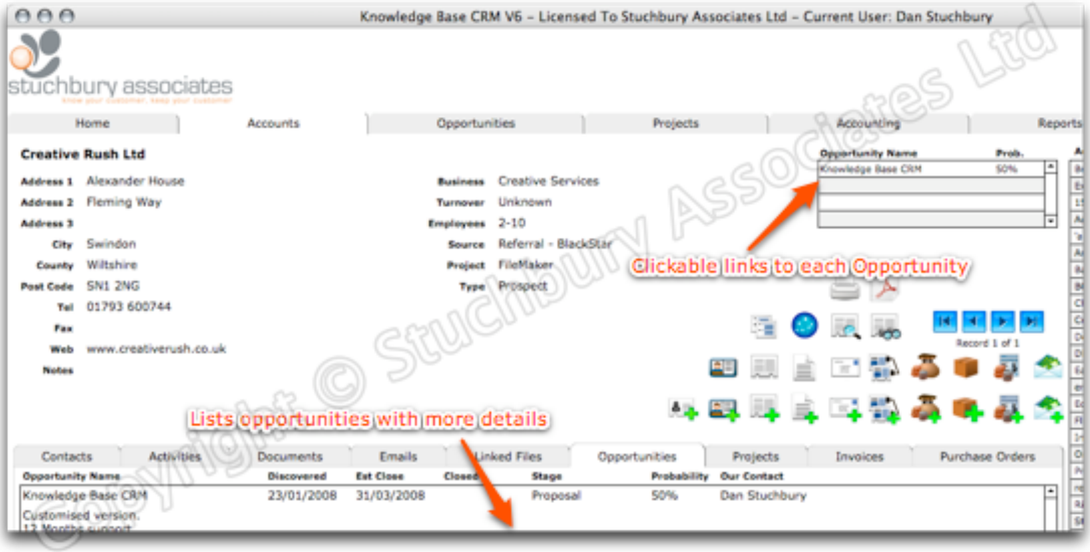
Knowledge Base CRM V6

Opportunity Management

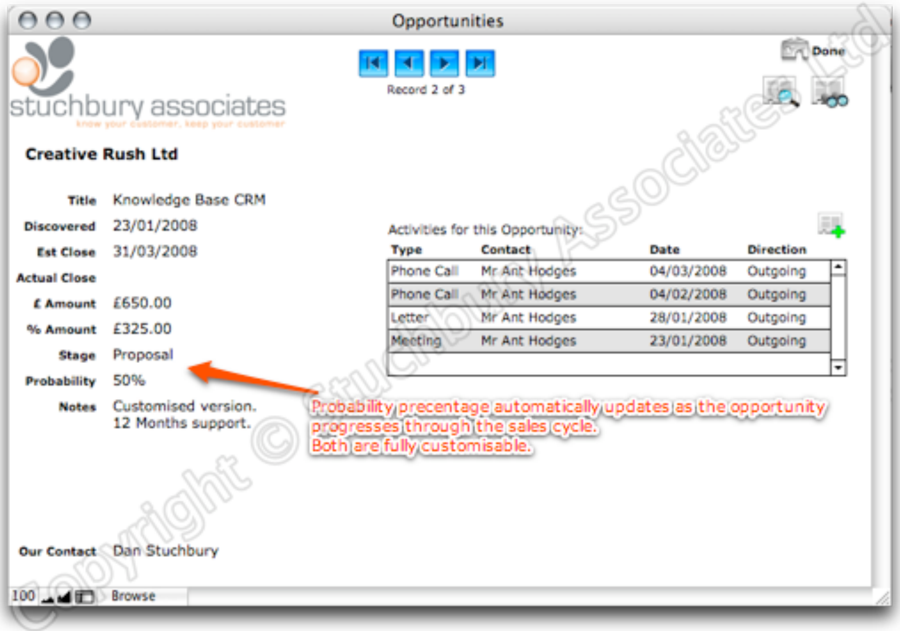
A major improvement from the previous version is better handling of sales opportunities. Each account can still have multiple opportunities, however there is no longer a need to dedicate one of the customisable fields for the sales cycle stage. The accounts screen has an opportunity preview window, which shows the name and probability percentage of the top five opportunities, as shown below. And one click opens that opportunity.



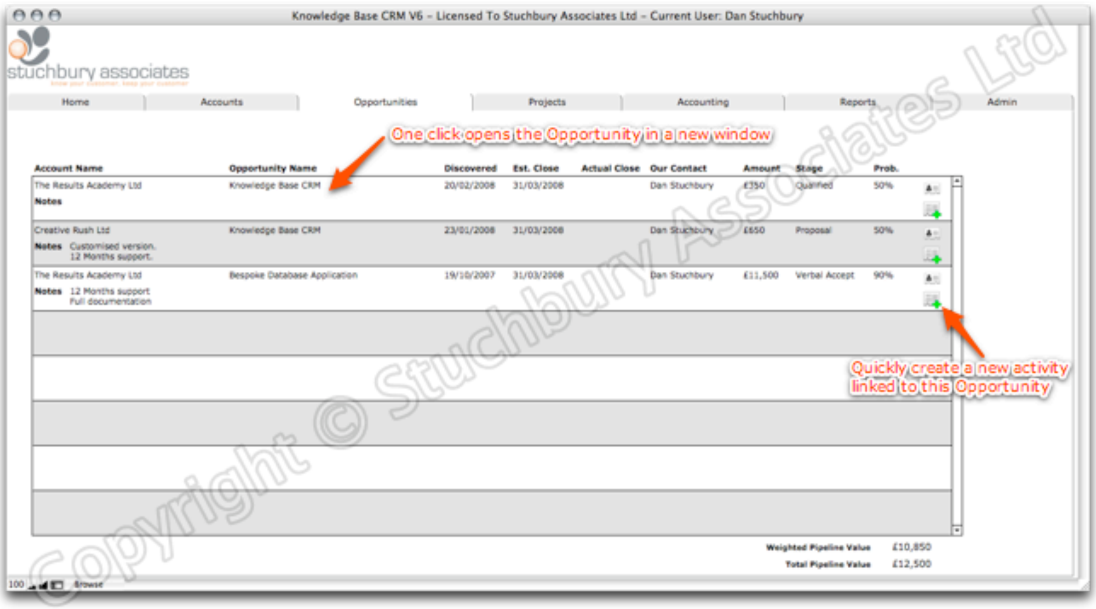
The number of opportunities, and the information displayed displayed in the preview window can be customised, if required.

A single opportunity, shown (right), is accessed by a single click from the accounts screen. It shows the full details of the opportunity along with all of the activities associated with it.

The probability percentage automatically updates as the opportunity progresses through your sales cycle.



Selecting the 'Opportunities' tab, displays the screen below, which lists all of the current opportunities.



At the bottom-right is the pipeline value - showing the weighted and un-weighted values, giving you a snapshot of the value of your sales pipeline. The opportunity list shows the most important information, and is by default, sorted by estimated close date. The field(s) this list is sorted by can be customised.

One click from the opportunities list opens the opportunity in a new window (as shown above). One click creates a new activity for any of the opportunities displayed, and the key information from the opportunity (value, sales cycle stage, probability percentage) is automatically inserted into the activity notes.

Knowledge Base CRM has been developed to be customised. It gives you the ability to specify how you want each module to work, and our development team will create it for you.

For example, you may want to be able allocate opportunities to more than one person (possibly including a Regional Sales Manager or Director), or create a dashboard based on the current opportunities in each user's individual pipeline. You may want to give your Sales Director a general overview of the performance of individual sales people, with the ability to drill-down for further information on specific opportunities (or sales a sales person's activity), or add notes for the sales person to view next time he / she logs in.

Development costs for customisation are quoted in advance of any work taking place, so you always remain in control.

With Knowledge Base CRM from The Stuchbury Group, the possibilities are endless.

For more information on how Knowledge Base CRM can help your business become more effective and efficient, contact The Stuchbury Group on 0844 884 2404 to arrange a no-obligation discussion and demonstration.

the stuchbury group