

How Sales CRM Helps Your Business Grow & Customer Relationship



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Business
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#1 Market share Malaysia,
Singapore, Indonesia.



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Challenges in Sales





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What is CRM

Customer Relationship Management

Acquire

Attract **leads** from multiple sources. Create personalized campaigns and optimize your website to maximize conversions.

Engage

Engage in **contextual conversations** with leads on multiple channels like phone, chat, email, and social.

Close

Know your customer more. Build a strong sales pipeline and close deals faster.

Nurture

Help customers grow by staying on top of their needs. Develop **long-lasting customer relationships**.



Create, Keep & GROW your Customer



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Fundamental Sales Formula

of Leads X % Conversion Rate = # of Customers

of customers X # of Transactions X Average Dollar Sale = Revenue

# Lead	100	150	100	100	100	120
Conversion Rate	50%	50%	70%	50%	50%	60%
# Customer	50	75	70	50	50	72
# Transaction	2	2	2	4	2	3
Average \$	10	10	10	10	13	12
Revenue \$	1,000	1,500	1,400	2,000	1,300	2,592



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How CRM Help Business Grow

Web-to-Lead

Processor *

Intel Quad Core Xeon E3

Memory * Storage *

16 GB 2 x 2TB (RAID 1)

Operating System * Service Level Agreement *

Linux Unmanaged Service

Units of Server *

1 Unit

Your Name * Your Email *

Mobile * How Did You Find Us *

Please Choose One

Submit Enquiry

* Required Field

Leads > All Leads

<input type="checkbox"/>	NAME	LEAD SCORE	STAGE
<input type="checkbox"/>	Jane Samperton Sales Manager Widgetz.io	93	New
<input type="checkbox"/>	Kathryn Bonalumi HR manager State Library	79	Contacted
<input type="checkbox"/>	Luz Broccoli Relationship Manager Wynn, Mary Ellen Esq	69	Contacted
<input type="checkbox"/>	Desjardiws Sales Manager Selsor, Robert J Esq	64	Demo
<input type="checkbox"/>	Blair Malet Finance Executive Bollinger Mach Inc	59	Interested
<input type="checkbox"/>	Ben Majorga Vice President of Sales Voyager Travel Service	23	Contacted
<input type="checkbox"/>	Lera Houah Sales Trainee York Services Jewel Limt	23	Contacted



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Segment and Organise Your Team

Search by lead, contact, account, deal

Admin Settings > Territories > Edit territory

Territory name *

Michigan - Real Estate

Description

This territory auto-assigned the leads based out of Michigan from the Real Estate industry

Territory rules

AND OR

State is in Michigan

AND

Industry type is in Real Estate

Add rule

List of users who have access *

Taylor Hansen George Johnson Gavin Anders

List of users for auto-assigning leads in round robin

Taylor Hansen Gavin Anders

Need help configuring your settings?
Try these resources:

How are leads automatically assigned using territories?
How can I use territories to organize my team?
How do I delete a territory?



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Client Profile Enrichment

The image shows a CRM interface with a sidebar on the left containing various icons. The main content area displays a client profile for Jane Sampleton. The profile is shown in two states: a full profile and an enriched profile. The full profile includes a search bar, a navigation bar with 'Leads > Jane Sampleton', a profile card with a score of 96, and a table of enriched data. The enriched profile is highlighted with a red border and shows the same information but with a 'Hot Lead' tag and a 'Click to add tags' button.

Search by lead, contact, account, deal

Leads > Jane Sampleton

Email Call Edit

96 Jane Sampleton

Sales Manager • Widgetz.io

Glendale, Arizona, USA

Hot Lead Click to add tags

Emails	janesampleton@gmail.com
Product	Bluenote Pro
Work	(368) 493-2360
Sales owner	Rebecca Morris
Territory	Connecticut
Address	604-5854 Beckford St.

Leads > Jane Sampleton

96 Jane Sampleton

Sales Manager • Widgetz.io

Glendale, Arizona, USA

Hot Lead Click to add tags



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Lead Scoring

How to categorize

Freshsales has three default categories for leads: Hot, Warm and Cold. Hot leads are your sales-ready leads, while Warm and Cold leads need nurturing. Use the slider below to edit the lead score range for each category. You can also rename these categories to reflect your company's sales language.



Leads > Monica K



Monica K f i in
Director of Sales - Rosva Tech
CA

Monica K f i in
Director of Sales, Rosva Tech

Lead since Apr 16 2020 with current stage in **Interested**

Lead score **+100%** in last 7 days. Top scoring factors:

- Has authority is checked
- Lead stage is Interested
- Sales owner is Shubin Joseph
- LinkedIn is l.com
- Twitter is l.com

Contacts > My Contacts

NAME	LEAD SCORE	OPEN DEALS	LAST CONTACT	OWNER	EMAIL
James Samalet... CEO Wigetiz.com	99 ↑	\$ 3,000	8 months ago	Rebecca Richard	james...
Miss Dunning Relationship Mana... Wigetiz.com	99 ↑	\$ 5,000	4 months ago	Rebecca Richard	miss...
Kris Marrier Sales Manager King, Christopher...	33 ↑	\$ 0	4 months ago	Rebecca Richard	kris...
Lenna Paprocki Junior Sales Engin... Feltz Printing Servi...	17 ↑	\$ 0	Not available	Rebecca Richard	lenna...
Leota Dillard Junior Sales Engin... Commercial Press	17 ↑	\$ 0	Not available	Rebecca Richard	leota...
Apolonia Warne Business Developm... Kitchen People	17 ↑	\$ 0	Not available	Rebecca Richard	apolo...

Filter contacts by

Lead score: all

Owner: contains



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Sales Activities & Reminders

CREATE SALES ACTIVITY ✕

Give your sales activity a name *

Pick an icon to signify your activity

Check in

Allow sales reps to check in from the Freshsales mobile app (Android and iOS)

Predict outcomes for this activity :

- Interested
- Left message
- No response
- Not able to reach
- Not interested
-

Search by lead, contact, account, deal, report

My Appointments & Tasks

APPPOINTMENTS	TASKS
<p>Apr 2020</p> <p>17</p> <p>05:45 - 06:15</p> <p>Product demo Related to: Monica K</p>	
	<p>14:00 - 14:30</p> <p>Where: Refs corner</p> <p>Lunch meeting Related to: Levy Park</p>
<p>Apr 2020</p> <p>20</p> <p>11:45 - 12:15</p> <p>Where: Fiv Park</p> <p>Onsite meeting Related to: Najma Jafari</p>	
<p>Apr 2020</p> <p>21</p> <p>08:30 - 10:00</p> <p>Where: Global Infocity</p> <p>Team meeting</p>	
	<p>10:30 - 12:00</p> <p>Where: Conference room A</p> <p>Pipeline review</p>

Showing Appointments till 21 Apr 2020

Search by lead, contact, account, deal, report

Admin Settings > Workflows > Create workflow

APPLY WORKFLOW TO

Leads

Contacts

Accounts

Deals

Tasks

Appointments

Call logs

WHEN DO YOU WANT TO EXECUTE THIS WORKFLOW?

Execute when a record is created and run once, for each record

WHAT CONDITION(S) SHOULD TRIGGER WORKFLOW ACTION(S)?

AND OR

Lead properly Last contacted mode is in Deleted but No Reply

Add condition

WHAT ACTION(S) SHOULD BE PERFORMED?

Create Task Send follow-up email

Add action



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Track User Engagements

The screenshot displays a CRM interface for a contact named James Sampleton. The main section shows a vertical timeline of activities:

- Today**
- User Added** - James Sampleton - Fri Apr 13, 2018 02:46 PM
- Enabled Create lead and Associate email** - James Sampleton - Fri Apr 13, 2018 02:46 PM
- Sales Sequence Created** - James Sampleton - Fri Apr 13, 2018 02:07 PM
- Email Template Created** - James Sampleton - Fri Apr 13, 2018 02:00 PM
- Custom Report Export to CSV** - James Sampleton - Fri Apr 13, 2018 01:40 AM
- User Added** - James Sampleton - Wed Apr 11, 2018 08:41 PM
- Sales Sequence Created** - James Sampleton - Mon Apr 09, 2018 11:50 AM

On the right, a **LEAD SCORE** card shows a score of **99**. Below the score, it lists:

- Last seen:** Fri Apr 13, 2018 02:46 PM
- Last contacted:** Tue Oct 17, 2017 01:48 PM
- Last modified:** Mon Mar 27, 2017 11:53 PM

Below the lead score is a **FILTER** section:

- Date range:** 02/01/2018 to 04/15/2018
- Activity type:** Website visits, Events (checked), Emails, Phone calls, Appointments, Tasks, Lifecycle events, Chat.



































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API and Integrations

 <p>FRESHDESK Bring your CRM and Helpdesk together to engage in relevant...</p> <p>Learn more →</p>	 <p>FRESHMARKETER Bring sales and marketing together to tune-out outreach efforts and...</p> <p>Learn more →</p>	 <p>FRESHCHAT Allow sales reps to chat with website leads directly from the...</p> <p>Learn more →</p>	 <p>FRESHCONNECT Communicate in context and collaborate with teams across...</p> <p>Learn more →</p>	 <p>CALENDLY Use Calendly to schedule meetings to turn invites into Freshsales...</p> <p>Learn more →</p>	 <p>FACEBOOK Collect Facebook Lead Ad submissions and turn them into...</p> <p>Learn more →</p>	 <p>GETACCEPT Track and sign your sales documents from within your CRM...</p> <p>Learn more →</p>	 <p>KLENTY Put your sales communication on autopilot with the...</p> <p>Learn more →</p>
 <p>FRESHCALLER Make and receive calls, automatically log and record...</p> <p>Learn more →</p>	 <p>GOOGLE CALENDAR Book appointments, schedule meetings and calls on your...</p> <p>Learn more →</p>	 <p>MAILCHIMP Sync leads and contacts between your CRM and MailChimp to easily...</p> <p>Learn more →</p>	 <p>SEGMENT Track events and collect customer data from multiple touchpoints...</p> <p>Learn more →</p>	 <p>JUSTCALL Get slick to call and click to text buttons for your Freshbooks...</p> <p>Learn more →</p>	 <p>TOKY Make and receive calls, automatically log and record...</p> <p>Learn more →</p>	 <p>SESSIONS Automatically create leads or contacts. Add notes when...</p> <p>Learn more →</p>	 <p>INTERCOM Automate repetitive tasks involved in using Freshdesk with...</p> <p>Learn more →</p>
 <p>OFFICE 365 CALENDAR Book appointments, schedule meetings and calls on your Office...</p> <p>Learn more →</p>	 <p>HUBSPOT MARKETING Bring your CRM and marketing automation together for better...</p> <p>Learn more →</p>	 <p>ZAPIER Create trigger-actions between Freshdesk and popular apps and...</p> <p>Learn more →</p>	 <p>FRESHSALES FOR WEB Use libraries in JavaScript, Ruby, PHP, Python, and Java to track...</p> <p>Learn more →</p>	 <p>PAPERPLANE The Paperplane Freshsales combination lets you get real...</p> <p>Learn more →</p>	 <p>SETMORE Schedule online appointments and understand your Setmore...</p> <p>Learn more →</p>	 <p>RENTENTLY Sync NPS scores with Freshdesk and trigger NPS surveys when...</p> <p>Learn more →</p>	 <p>SURVICATE An all-in-one customer survey tool integrated with Freshdesk.</p> <p>Learn more →</p>
 <p>PIESYNC Automatically sync Freshdesk and all your apps to stay up-to-date...</p> <p>Learn more →</p>	 <p>GOOGLE APPS FOR WORK Maintain access control and make signing into Freshdesk easy with...</p> <p>Learn more →</p>	 <p>QUICKBOOKS Get notified, view invoices, payments, and outstanding...</p> <p>Learn more →</p>	 <p>GOOGLE CONTACTS Make manual data entry a thing of the past with the Google...</p> <p>Learn more →</p>	 <p>FULLCONTACT Sync your Freshdesk contacts with FullContact via Pipedrive or Zapier.</p> <p>Learn more →</p>	 <p>AKITA Akita provides a Customer Success solution that works with Freshdesk.</p> <p>Learn more →</p>	 <p>CONTACT FORM 7 Easily add contacts automatically and leads into Freshdesk when...</p> <p>Learn more →</p>	 <p>REVV Use Freshdesk and Revv together to create a powerful powerful...</p> <p>Learn more →</p>

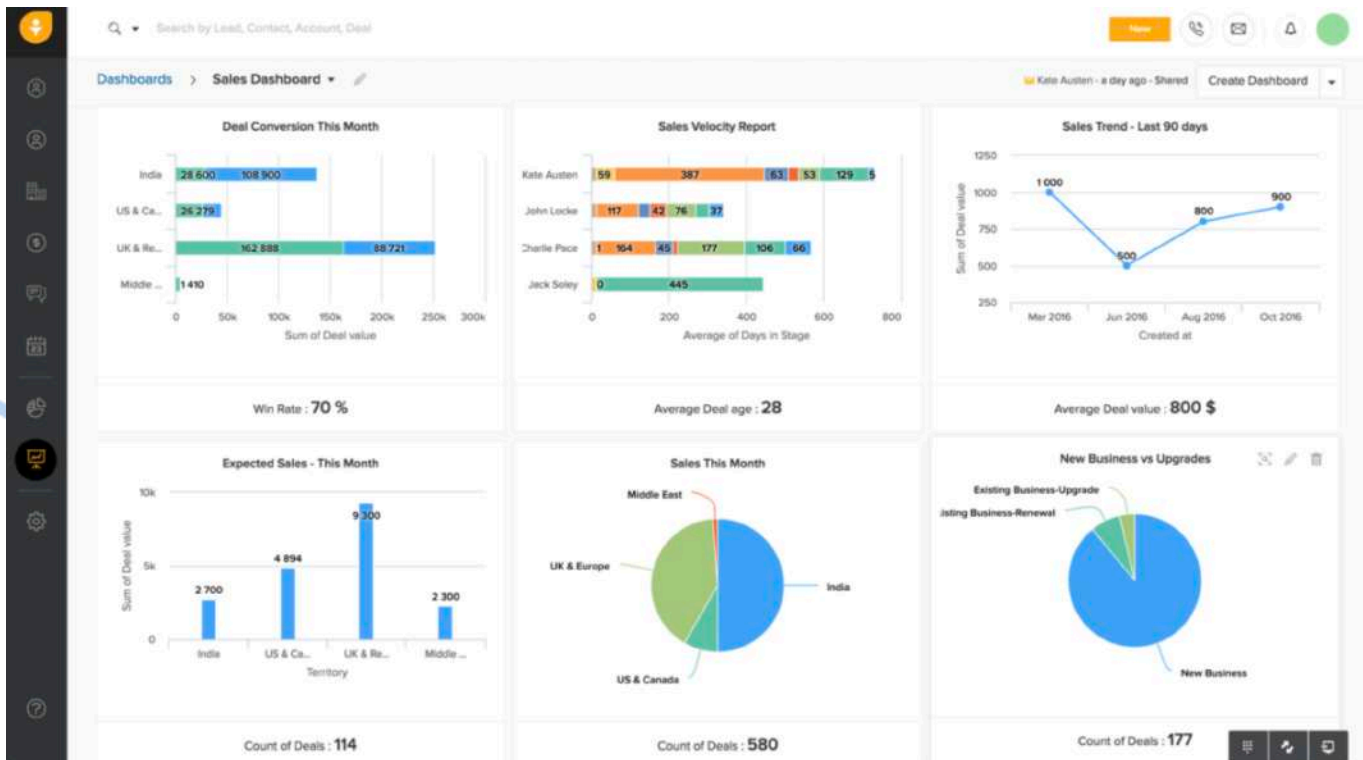


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Sales Reports and Dashboard



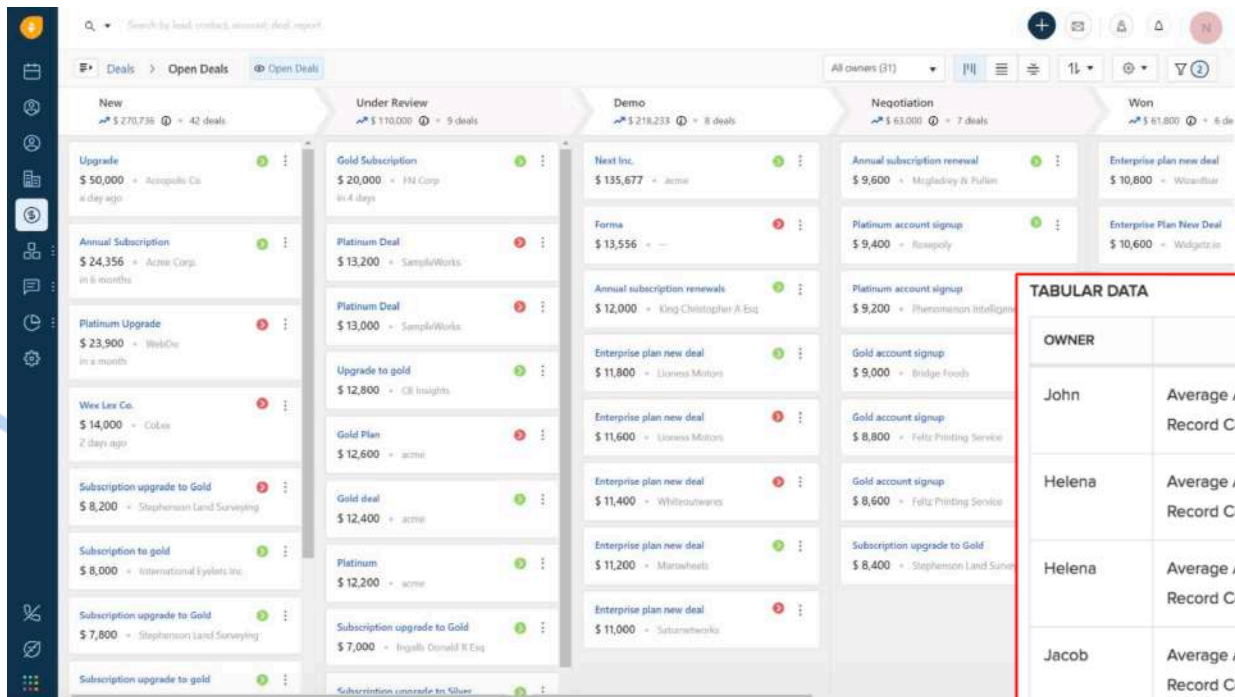


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Visible Pipeline



TABULAR DATA

OWNER		GRAND TOTAL
John	Average Age (in days)	22
	Record Count	4
Helena	Average Age (in days)	12
	Record Count	3
Helena	Average Age (in days)	19
	Record Count	11
Jacob	Average Age (in days)	25
	Record Count	9
GRAND TOTAL	Average Age (in days)	59
	Record Count	27



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SALES NEEDS	LEAD MANAGEMENT SYSTEM	SPREADSHEETS
Storing leads' details	✓	✓
Managing high volume of data	✓	✗
Automating lead capture and enrichment	✓	✗
Tracking leads' activities	✓	✗
Prioritizing leads	✓	✗
Creating reports	✓	✓
Making calls	✓	✗
Sending emails	✓	✗
Managing sales activities	✓	✗
Retaining all functionalities across devices	✓	✗



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<https://www.exabytes.my/freshworks/freshsales-crm>



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Thank You



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