The nature of property-related contract business tends to be highly complex. Whereas most other industries are customer-centric, the focus in the contract business is on the property. It is not surprising, therefore, that conventional CRM systems are unable to duly satisfy the demands associated with this type of operation.
Property management

The PiSA sales CRM offers you a specifically dedicated CRM template that provides a consolidated and well-structured view of all properties, sub-properties, and trades as well as a wealth of linked information. The system enables the transparent management of relationships between all the entities involved (customers, planners, developers, sub-contractors, dealers, processors, tradespeople, etc.) in terms of their connection to a given property. With all the relevant information at your fingertips, you will always know exactly who your point of contact in any given situation is as well as having a clear and comprehensive overview of all past and present inter-contact behavior.

Mobile CRM

You will, of course, also have remote access to property and customer data, to documents, appointment schedules, contact information, and much, much more on your notebook (online or offline), tablet, or smartphone.

Competition watch

The competition-analysis function in the PiSA sales CRM will put you in a position to maintain a 360° perspective on other market participants. Automatic reporting on their strengths and weaknesses, on the competitive situation (where and when you have been in competition with other businesses; who landed which contracts), on pricing by your competitors, or on rival-product listings will all enable you to act targeted. Information of this kind helps not only your sales staff, but is a valuable asset for management or the product development team.

Analyses and reporting

The PiSA sales CRM gives you everything you need for highly efficient analyses and meaningful reporting, thereby making your market more transparent and making even complex evaluations an easily manageable proposition. For example, it lets you view anticipated revenue in terms of the products and services offered for individual properties. The system will help you to optimize processes across the entire operating spectrum - from initial sales activities all the way to customer-development campaigns.
Indisputable benefits
- Centralized, evaluable management of project and property data lets you focus your activities more effectively on key profit-generating contracts
- 360° perspective on properties, stakeholders, histories, etc., including quick access to required information
- Forecast analyses, including at the individual-property level
- Duplication checking of property data, contacts, and documents
- Access anytime, anywhere to CRM data, documents, and contacts (online or offline)
- Language, currency, time-zone, and unit-of-measure definition options

Property management
- Clear allocation of a property or project number (ibu number)
- Key contacts immediately identifiable
- Status management of individual properties, including workflow
- Management of different property types (e.g. public or private projects)
- Immediate accessibility of core information (building phase, bid type, origin, start of bidding phase, submission deadline, contract-award date, building start and completion dates, budget, anticipated revenue, etc.)
- Technical details, trades, sub-properties, delivery/performance items
- Property-specific management of all relevant contacts and competitors
- Property-specific activities history, document management
- Follow-up scheduling; escalation mechanisms (deadlines)
- Overview of all business opportunities, quotes, and contracts associated with a particular property
- Management of selective addresses (e.g. place of performance, delivery address, billing address)
- Individual definition of property-assessment attributes, description of property/project
- Property calendar showing all schedule information, milestones
- Radius search (e.g. for sourcing suitable service providers in close proximity to a property, using freely definable filters)

Forecast analysis
- Information listing of all opportunities, quotes, and contracts - either comprehensive or at the by-property level
- Sales funnel featuring graphic analysis of the individual sales steps
- Reliable sales forecasting based on the automated (or manual) evaluation of individual cases; exclusion of individual business opportunities or quotes from forecast

ibau interface
- Configurable ibau data importing
- High-performance duplication checking of property data
- Click-of-a-button setting of threshold values for duplication recognition
- Checking of property name, ibau number, location, etc.
Document management
- management of documents of any format (Word, PDF, graphics, videos, drawings, etc.)
- version management featuring version history within the document information record (e.g. quotes, technical drawings)
- saving of documents drawn directly from Microsoft Office applications in the PISA sales CRM and their processing within the system
- importing of individual documents and document folders using the drag-and-drop function
- doublet checking of documents

Mobile CRM – online & offline
- local or remote access to your CRM data
- online access via smartphone, tablet, or notebook; offline access via notebook

Fit for international coverage
- UNICODE-enabled, supports any language (including Cyrillic, Farsi, and Chinese characters, among others)
- supports international currencies (project currency, company currency) and automatic currency conversion
- time-zone management, supports international units of measure

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