

Sales Management with PiSA sales

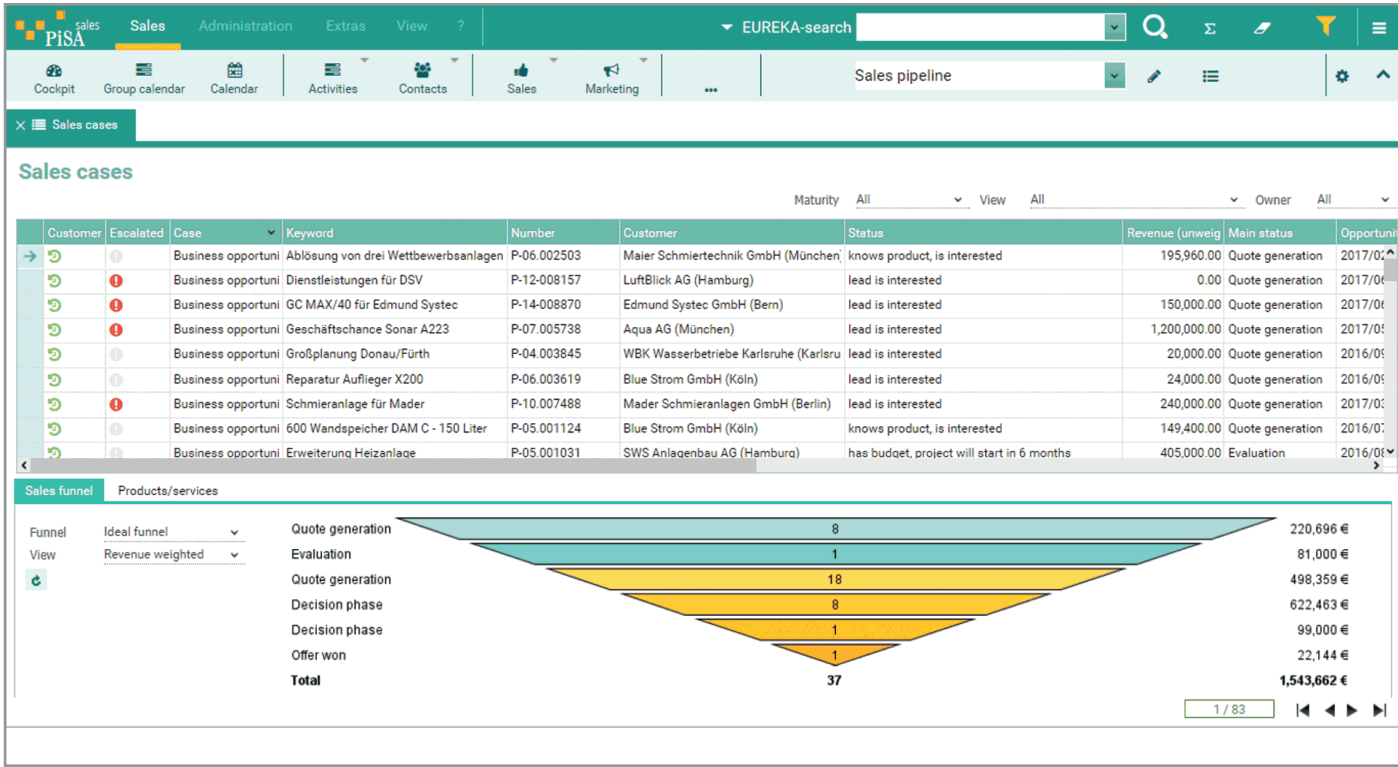
Innovative tools for your success

The sales management system in the PiSA sales CRM gives you unparalleled management and steering options as well as enormous time benefits for the inputting, processing, tracking, and evaluation of sales cases such as inquiries and opportunities handling, quote preparation, or order processing.

The system allows you to optimize and automate your field operations using digital visit reports, to use 360° perspectives on your customers or prospective customers, and to work through your to-do's and appointments more time-efficiently. It will also help you with the professional configuration and calculation of quotes, the analysis of business potential, and evaluation of the sales funnel. Our mobile CRM solution means you will have access to all your information - online or offline - anywhere, anytime.

- ✔ effective case execution using a shared knowledge basis
- ✔ role-based management of access to cases and allocated information/documents
- ✔ centralized management of case-specific activity histories / tasks, documents, contacts, etc.
- ✔ seamless support for the processing of sales-relevant material in document folders and through document structuring
- ✔ specific workflows for all sales cases including the automatic generation of standard activities (tasks, appointments, etc.) as well as standard documents (templates, guidelines, terms and conditions, etc.)
- ✔ calculation of weighted revenue using get-and-go probabilities
- ✔ comprehensive forecast analysis and presentation of the sales pipeline including requested, offered and ordered products and services
- ✔ easy determination of delivery scope based on opportunity, quote and order information
- ✔ visualization of processes, analyses, and results, and presentation of the relevant competitive situation

The PiSA sales CRM is designed to add efficiency to B2B sales activities for products and services, with specially conceived functions and views offering unique benefits to businesses operating in this environment.



Overview of sales processes

Central sales management

As a sales manager, you benefit from unique ways of sales management using a shared knowledge base to enable quick, direct access to all operating figures and sales cases. Workflows will guide you and your team reliably along the path from an inquiry and business opportunity to the quoting process and from there to order processing.

All information on companies and contacts, tasks, appointments, correspondence, documents, and more is available directly at each case. The system manages contact information on in-house and external operatives, suppliers, or competitors by role allocation.

Integrated sales planning enables current actual figures from the sales pipeline to be set against the relevant target figures. Top-down and bottom-up views provided in planning-tree diagrams facilitate the planning process. You can choose to map out sales plans by sector, region, customer, product or product line, sales unit, or by employee. It takes no more than a few clicks to access the latest sales data and even view it in your personal cockpit.



PiSA sales CRM smartphone app

Quote tracking

The workflow in the PiSA sales CRM is configured in such a way as to allow not only a 360° view on all standing quotes, but it will also help you to follow quote progress and recapitulate the source case (e.g. business opportunity), making it quick and easy to convert a business opportunity into a quote and then an order. All key information will be moved to each new case level and be maintained in an overview of the case history.

The benefits are self-evident: The management of sales cases in the PiSA sales CRM allows centralized and uniform filing and management of all the information that is key to the success of your sales operations.

Forecasts and evaluations

Comprehensive forecast analysis allow you to perform a valid prognosis of your sales successes. The transparent overview of pending opportunities, quotes, and orders helps you to identify of your pipeline's strengths and weaknesses. Based on the 360° view on a single sales case and the linked information on strengths and weaknesses of the competition you and your colleagues can derive the optimum strategy.

Strategic decisions are best made based on reliable figures. The PiSA sales CRM provides you with powerful analytic tools and reporting features. You will be able to issue quick ad-hoc evaluations with a single click as well as condensing multi-level data easily in multiple dimensions. The integrated Report Center provides comprehensive and professionally designed reporting. It gives you current analyses from sales, marketing, and service operations as well as activities management. In addition to the numerous prefabricated standard reports the system provides, you will be able to easily fashion individualized charts for issuance in a variety of formats, including Excel sheets, PDF, and Word documents.

Delivery scope and quote calculation

Easy-to-define structured delivery scopes deduced from the relevant sales cases are produced with just a few clicks. Shortcuts for delivery items, product and service requests, text and sum lines, as well as drag-and-drop functions all facilitate the easy preparation of overviews and processing of delivery scopes.

With a powerful management of text modules, you can use appealing text libraries (including images and tables) that can be stored in multiple languages in the CRM system. With just a few clicks, you can create e.g. a Chinese quote document and its German version. Besides the output of quotes, the generation of quote-specific technical specifications, technical manuals, or operating instructions is possible as well.

The PiSA sales CRM enables flexible case and product calculations and it gives you a variety of calculation groups within a uniform calculation model. You can choose from options for single products, a product mix, or a revenue-specific price calculation. The PiSA sales CRM supports them all.

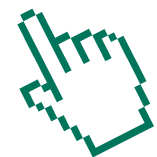
Represent the competitive situation case based

The PiSA sales CRM also allows you to collect competitor information for clear overviews in different competitor-profile categories. The relevant information is retrievable from a central contact database. You will have the option of setting competitor products or activities against your own sales cases and analyzing and evaluating them to determine the current competitor situation in objective and evaluable terms and will then be able to conclude targeted sales and product strategies. All collected information on a competitor can be automatically analyzed and issued in professional reports.



We will be pleased to advise you!

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