



# SALES MANAGEMENT SOLUTION ON POWERAPPS

CUSTOM BUILT FOR FINANCIAL SERVICES

Investing large amount of time in piecing together sales data in a random spreadsheet just does not make sense anymore. A need for a robust sales management solution which saves time, boosts productivity of the sales team is the need! Our sales management solution built on power apps does just that. It is specifically built to cater all sales management functions for financial services industry. It comes preloaded with lead management, contact & account management and activity management functions. Our solution allows you to :

## Advantages

- **Right balance between feature and flexibility** -We ensure that your business requirements are met and at the same time the solution remains simple and manageable.
- **Tested and certified** -all our solutions go through the most rigorous testing and receives Microsoft's highest quality certification for partner solutions.
- **Feature rich** - Extensive functionalities born out of deep understanding of the financial services industry makes sure that most of your requirements are met out-of-box.
- **Flexible** - A flexible solution framework allows you to configure your unique processes quickly.
- **Access anywhere** – the solution not only works on desktop, but also on tablet and smart phones allowing you to work in offline mode.
- **Built on a world-class business application platform** – MSFT PowerApps offers a flexible and adaptive development framework, built-in intelligence and a best-in class cloud infrastructure.

### ✓ Cater to leads from multiple Channels

- Our solution integrates all the customer channels and ensures that no lead 'falls between the cracks'.
- The solution helps the sales users to capture leads from multiple channels such as telephone, email, campaigns, organization websites and other external systems.

### ✓ Manage leads & opportunities for retail & corporate business

- The solution is built for both retail and corporate business verticals.
- Preconfigured sales processes prompts the salesperson through each step of the sales cycle, highlighting next actions, missing info, TAT & its adherence.
- Analyze and score leads based on their information collected , current status and number of special activities/interactions performed.

### ✓ Other features

The solution covers all your requirements required to manage the sales process. The solution comes predefined with

- List of products catered by the nature of your business.
- Auto-generate sequences and QR/Bar codes for your records.
- Automation of communication with leads at different stages of life cycle
- Reports & dashboards for each industry segment .
- Separate app for administrating sales entities.

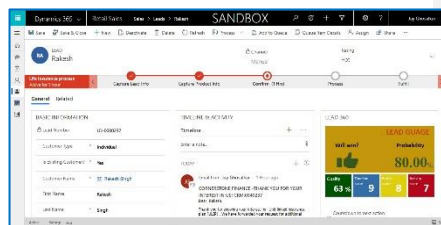
### ✓ Automate assignment

Churn out TAT & reach out to leads and customers using our in-built assignment feature:

- Branch assignment – assign leads to the best available resource of the branch.
- Geo-based assignment- assign leads to on feet salespersons based on their live locations.
- Use custom assignment framework to assign leads by defining complex logics with a simple and easy user interface.

### ✓ Predict conversion ratio

- Predict conversion probability of leads with in-built AI capability of the solution.



### ✓ Customer 360 view

- Collate and present insightful and actionable information about your customers.
- The system comes pre-loaded with a set of templates for financial service industries.

