



DEMO TELECOM  
Dashboard - 15 June, 2022  
Refresh jimbhai of SIM Cloud  
Team Case Ratings  
the Layer®  
Team Overall Cases

#1 Telecoms & IT  
CRM Solution

ID	ISSUED	CATEGORY	REFERENCE	STATUS
10	10 Jun	Training Company 1 Transfer the services from one phone to...	1000-DTC-TEL	Open
11	11 Jun	Test Company Test Case	1001-DTC-TEL	Open
12	12 Jun	Test Company Test Case	1002-DTC-TEL	Open
13	13 Jun	Test Company Test Case	1003-DTC-TEL	Open
14	14 Jun	Test Company Test Case	1004-DTC-TEL	Open
15	15 Jun	Test Company Test Case	1005-DTC-TEL	Open
16	16 Jun	Test Company Test Case	1006-DTC-TEL	Open
17	17 Jun	Test Company Test Case	1007-DTC-TEL	Open
18	18 Jun	Test Company Test Case	1008-DTC-TEL	Open
19	19 Jun	Test Company Test Case	1009-DTC-TEL	Open
20	20 Jun	Test Company Test Case	1010-DTC-TEL	Open

# Automate, Unite & Grow

Join the leading ICT companies using The Layer to:

01. Save ££££s and time by increasing efficiency.
02. Build better relationships and delight employees and customers.
03. Grow revenue and dramatically increase profits.



Discover how we can support your digital transformation journey through a unique blend of industry-specific software and professional services.

MARKETING MANAGEMENT

PROSPECT MANAGEMENT

SALES MANAGEMENT

STOCK & ORDERING

FINANCE & REPORTING

CUSTOMER EXPERIENCE

## One platform to accelerate your business

Our mission is to use technology and real-time, accurate data to help customers in the ICT channel solve their greatest challenges and exploit valuable opportunities.



**Scale your business easily**



**Unlock operational efficiencies with 360° view**



**Unite teams to drive business growth**



**Measure what matters with accurate data**



**Boost retention**



**Speed up your quote to invoice time**



**Securely work from anywhere**



**One system for easier management**

"We tested other CRMs relentlessly for several years before finally signing with The Layer. My first choice had been Salesforce which is an excellent tool. However, when I discovered The Layer I instantly saw how I was going to get a more personalised product for a fraction of the price. Over 5 years later I am extremely happy with my decision."

**Charmaine De Souza, Managing Director, BusinessMobiles.com**



A screenshot of a web application interface for marketing management. The top navigation bar includes 'DEMO TELECOM', 'Stock', and 'Finance'. Below the navigation, there are tabs for 'Build Targeted Email', 'Inventory', and 'Approval'. The main content area shows an 'Edit E-mail Content' screen with a 'Subject' field, a 'Hello {{first}}', and a paragraph of text: 'We are running a special promotion for Q2 customers and'. There is also a 'Template Library' section on the left. The background of the entire page features a blue abstract graphic with a lightning bolt and a smartphone.

# Marketing Management

## Create highly targeted campaigns with maximum reach and conversion

Powerful datasets within The Layer, combined with the ability to create beautiful HTML campaigns to target prospects and customers at the right time in their buying journey. Smart analytics enable you to measure success and calculate ROI to inform future marketing spend and to focus on the most successful activities.

### Key Marketing Features

#### Campaign Creation

- Scale your campaign activities with workflows to establish Marketing Qualified Leads.
- Schedule multi-tiered campaigns.
- Target prospects prior to the contract renewal dates.
- Auto-assign follow-up tasks in order to convert leads into sales opportunities.

#### Activity Tracking

- Dashboards and reports show 'opens', 'forwards' and any 'click throughs' for campaign tracking.
- Monitor campaign results by tracking conversion rates and campaign ROI.

#### Compliant Communications

- Pre-built email templates to communicate service-related issues, product and pricing updates and nurture content.
- Manage contact preferences and GDPR compliance requirements with automated opt-out functionality.

#### Lead Nurturing

- Set up communications once and let The Layer arrange callbacks or reminders.
- Sales teams can quickly access all activity logged to each record to provide a positive sales experience for prospective customers.

"We like the way that the marketing module allows us to target our prospects and customers at the right time with the relevant information."

**Rebecca Leeming, Managing Director, 360 Group**



# Prospect Management

## Simplify lead management, streamline processes and record all sales interactions

Nurture your leads through the sales cycle from new to qualified, set up marketing templates and brochures to provide consistent, professional messaging whilst making it quick and easy for your sales teams to record key information and interactions for future follow-up. Using The Layer's advanced features, real-time performance can be monitored and opportunities created anytime, anywhere.

### Key Prospecting Features

#### Customisable Workstacks

Ensure your data stays secure and control access using highly customisable views in workstacks, providing your team with access to the right data and the right time.

#### Lead Tracking & KPI Reporting

Have real time visibility of how a team is performing, and how leads are flowing through the process using our dashboards and dedicated reporting features.

#### Automating Workflow

With the easy-to-use appointment booking feature, communications templates and email integrations, you can reduce time spent on admin and focus on sales.

#### Measuring Success

Customisable lead and opportunity sources, combined with real-time appointment feedback, allow you to quickly see which data sources and activities are driving the biggest revenues.

"Using The Layer gives us a way to efficiently manage our lead data and get rid of clunky spreadsheets." **Seamus O'Neill, Managing Director, Delta 365**





# Sales Management

## Manage quotations and sales, and stay on top of pipelines, maximising conversion rates and profitability

Let your sales team flourish with intuitive sales processes and automation. Improve task management, forecasting, reporting and sales management with a single view of all customer interactions.

### Key Sales Features

#### Develop Your Portfolio

- Real-time sales pipelines and forecasting is made simple and accurate.
- Having all your data stored in one platform allows you to quickly launch new products and services across multiple sales teams working from multiple locations with accurate, yet flexible price books.

#### Feature Rich Quote Tool

- Using the enhanced packages and leasing functionality, sales teams can eliminate manual processes and clunky spreadsheets.
- Built-in deal calculator and configurable approval engine allows full control over quotes that are not commercially or technically viable.

#### Sales Cycle Management

- Track all lead and opportunity interactions centrally, throughout the sales journey.
- Built-in reporting and API means you can use the data in many ways, allowing management to quickly see where to support the team to help meet revenue targets.

#### Renewals & Cross-Selling

- Configure bespoke work queues to show when renewal dates are approaching.
- With a single view into the customer account, you can view the full history of all purchases and quickly implement renewal tactics for up-sell or retention.

"The Layer has been vital in our continued growth in non-mobility revenue, with a 200% growth in fixed-line telephony and connectivity over the last 36 months. We would not be able to handle this exponential increase and workload had our CRM system not been able to handle other revenues..." **Shez Cheema, CEO, Tela Technology**



# Stock & Order Processing

## Ensure that all products and services are processed and dispatched efficiently

Our order processing module provides a real-time, 360° view of the progress of orders. Your order processing teams can manage key tasks such as: order approvals, credit checks, porting dates and stock dispatch in a single platform to reduce errors, saving both time and money.

### Key Ordering Features

#### Simplifying Order Management

- Orders are automatically created from the signed quote.
- Custom process-driven work queues, order statuses and checklists deliver structure and allow multiple teams to process orders.
- Maintain full control with order approval and adjustments.

#### Accurate Data Entry

The Layer provides a joined-up view of all channels and acts as the automated link between them all. This means reduced errors, faster-updated inventory, quicker order turnaround and better customer interaction.

#### Accelerated Revenue

Using The Layer to raise purchase orders, sales invoices, and control stock, together with our industry specific integrations and automated billing queue app, allows you to improve data accuracy and speed up time to revenue.

#### Build Customer Loyalty

- Keep sales teams and customers up-to-date with the progress of orders with our order tracking widgets, reporting tools and workflow emails.
- Use The Layer's case system, calendar function and forms to manage engineers and monitor KPIs and SLAs.

"The Layer has become an essential tool to ensure accurate order delivery for our UC products and services – no matter how big the project!"

**Jamie Andrews, Provisioning & Support Engineer, Yappi**





# Customer Experience Management

## Manage cases, complaints and retain key knowledge with our searchable knowledgebase

Look after customers with our dedicated service module. With a highly customisable case management system, smart workflow, live widgets, SLA and customer feedback monitoring, your customers will never feel forgotten.

### Key Service Features

#### Insightful Data, SLAs & Reporting

- Monitor response and resolution SLAs with breach notifications.
- Dashboard widgets allow managers to track KPIs and analyse trends that are impacting customers by case category.

#### Personalised & Real-Time Interactions

- 360° single pane of glass account view.
- Visibility of all notes, historical cases, orders, in-flight opportunities, and account balances.

#### Flexible Contact Methods

- A dedicated branded customer portal, knowledge base.
- Triage system capable of managing multiple mail inbound email addresses.

#### Create and Manage Workflows

- Tailored work queues and full task and communication management.
- Simplify and bring structure to case management with checklists, workflow, email templates and automation.

#### Managing Communications and Feedback

- The Layer's feedback tool allows you capture this information in real time.

#### Time & Cost Management

- Log the costs and time taken to manage a customer account.
- Log time against a case and deduct that from a set plan.

"The use of workstacks and dashboard widgets give both staff and management full visibility of live data and SLA's which helps to proactively manage customer accounts."

**Aidan Piper, CEO, Welcomm Communications**



# Finance Management

## Forecast transactions that impact your overall financial health

Ensuring you are collecting the right revenue and making payments in a timely manner is vital to your business' success. Our Finance module ensures you can manage all your financial processes and reconciliations in one easy to use platform without inhibiting growth.

### Key Finance Features

#### Streamline and Automate Payments

- Combine multiple systems into one platform, to accurately manage POs, invoices for one-off items, up-front charges, customer payments and credits against the invoice.
- Create custom work queues, to bring the finance team into your sales processes.
- Automate sales commissions, to reduce cost and increase transparency.

#### Data Accuracy

- Precise commercials from price books for easy revenue calculation, cost of sale reporting, and business forecasting & planning.
- Tracking goods received/not invoiced can speed up cash flow.
- Visibility of credit limits and accounts on hold.
- Save time on creating reports across multiple systems and manual spreadsheets with a unique suite of reporting tools.

#### Funds and Transactions

- Technology/kit funds and subsidies can be added at the quote stage and carried through to the order to be processed by finance and added to the account balances.
- Specific teams can also be given access to the transactions tab which shows all financial activity on the account with the ability to generate mini statements for the customer.

"Using The Layer has helped us to bring, and manage, all our inventory, commissions and billing into one platform which has supported us in growing the business."

**Gareth Williams, Finance Manager, UWC**



# Reporting



Jonathan Applecore  
User: demouser

All Custom Reports

CSV Excel Report Name

## Transform your business with accurate, real-time reporting and make informed, data-driven decisions!

We've taken a flexible approach to reporting. Choose from our comprehensive suite of in-built dashboards and exportable reports.

Use data to make more informed, better decisions resulting in more compelling market sales propositions, increased revenue and profit, improved operations, high customer retention rates and happier more empowered teams.

### Using The Layer ensures that:

- Your data is accurate, reliable and real-time
- Automation & validation removes delays and avoids errors
- Your team have access to the information they need to thrive in their roles



## Delve deeper into your data with a dedicated business intelligence (BI) platform

Set up data warehousing and join data from multiple sources to provide a comprehensive view of performance and alerts across all areas of your business using various platforms, such as: CRM, Billing Platforms, Finance Packages, Marketing Data, and Supplier Portals.

The Layer's feeds will power your analytics and give you unique, real-time and accurate insights into your business performance. Simply choose your preferred BI platform and connect to The Layer's API feeds or use our SQL Connector.



"The Layer gives us access to incredibly powerful and detailed Sales Management Reporting....As a business, we've saved countless hours in administration time as well as more critically, gaining accuracy and transparency across our sales reporting systems."

**Julie Cassidy, Marketing & Project Manager, NCS**

# Integrations

## Extend The Layer

Hook up your finance, billing, marketing automation or email system to The Layer to streamline your workflow. As well as a multitude of pre-developed features out of the box, we can also assist with any custom integration requirements.



## A trusted technical partner

### Delivering secure & robust technical solutions



#### Encrypted Data

Data is transferred between you and The Layer service using the same AES 256-bit encryption used by financial institutions.



#### Role-Based Granular Access

You can decide which information to expose to certain roles within the business. You can also track all user activity through our audit trail feature.



#### Secure Datacentres

Data is securely stored in datacentres in Europe, and we operate Layer Systems operates both centrally managed and customer-configured backup options.



#### Scalable Infrastructure

Being cloud-based, our system can easily grow with you. We've taken away the stress, time and cost of managing your own server infrastructure.



# Reduced risks with managed onboarding and dedicated support

Let our experienced professional services team take the pain and worry out of changing systems with our fully managed onboarding process. They take ownership and responsibility for making sure each project is a success, and ROI-centric, minimising the risk to your business.

01.

## Business Analysis

This is the most important step for a successful project. We get under the skin of your operations by reviewing your existing systems and processes across the entire business. We present our findings, highlighting any key configuration and development requirements, to ensure we deliver a solution that fits your specific needs and goals.

02.

## Build

Working closely with your project team, and using specialist project management tools, we will initiate and configure your unique instance of The Layer. All activity is carried out with agile development methodologies, with collaboration and check-ins at every stage.

03.

## Testing

We arrange regular reviews and hold sessions with key stakeholders to walk them through configuration points and features. We encourage feedback and implement any relevant changes before providing access to fully test and sign off the functionality.

04.

## Data Migration

Our data team collaborate with you to carefully review your existing data sources to create a detailed migration plan. We have over 10 years of delivery experience and understand the pitfalls that can occur, so we are well-versed in this important stage of the process.

05.

## Training

End-user adoption is key for maximum ROI. Our project team will ensure that all users receive customized training with supporting material for your new CRM. Our post-launch process ensures we continue to collaborate and be on hand should you need any guidance.

06.

## In-Life Support

Once you are fully onboarded you will be given a dedicated account manager and access to our customer portal with a number of tools, live chat and knowledgebase content. Our UK-based customer success team will always be there to support you to ensure you are getting the most ROI out of The Layer.



the Layer<sup>®</sup>

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