



T TECH CRM

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TRIAD
SOFTWARE SERVICES
Technology With a Business Focus

PROJECT SALES CHALLENGES

- Complex sale requiring team approach – sales, product managers, design team, legal/finance
- Multiple people need to be mapped – architects, consultants, project managers
- Many product lines / many possibilities for configuring a solution
- Multiple bids for the same opportunity with multiple contractors
- Sales process can be lengthy – important to remember history (price , discounts quoted in the past)
- Numerous tasks - Sales call reports, notes, memos, emails, faxes, telephone calls and meeting
- Fragmented information – effort to keep together in a project file
- Knowledge with individuals – collaboration requires significant manual follow-up activity

PROJECT SALES CRM

- Address the need for data capture, data management and data sharing.
- Provide a structured process for effectively managing the sales cycle.
- Enable sales people to focus on more and better opportunities.
- Remove the pain of sales reporting.
- Make sale forecasting easier and more predictable.
- Automatically create a “project file” as and when activities or tasks are executed
- Communicate in context and on time
- Remove the drudgery of task management / Focus on customer opportunities and relationship

CREATE OPPORTUNITIES

- Scan Projects data in the region and enter/upload
- Identify potential accounts
- Establish who is what – Consultant, Architect, Owner's representative, sub-contractors
- Schedule delivery of brand samples to ensure qualification of product/brand represented
- Define a key account activity plan
- Receive bids

MANAGE OPPORTUNITIES

- Establish Technical feasibility
 - Collaborate with design team / manufacturer's representative
 - Validate solution configuration
- Exercise Commercial Due diligence
 - Have I worked on this bid with anybody else?
 - Have I worked with this subcontractor before?
 - If so what is the history -price/discount levels
- Collaborate
 - Finance - Organise tender bond /track expiry dates
 - Mgmt – Price discount levels / unusual logistics /approvals for any exceptions in the engagement

CREATE VALUE

- **Schedule Mockup / POCs / Demos**
 - Online Conflict management in Appointment management
 - Integration to Outlook
- **Communicate / Collaborate – On time In context**
 - Internal workflows – Discount approvals, meeting requests
 - External influencers , decision makers – mail, sms, telephone calls
- **Track – Take proactive action**
 - Opportunity history – who has done what, when
 - Communication History -Plan, execute, store communication history in context to project, tender and person
 - Documents – upload drafts, revise, track changes
- **Take stock - Be predictable**
 - Rate the opportunity with an objective rating sheet
 - Update opportunity status pipeline and forecasts



BUILD LIFETIME RELATIONSHIPS

- We remember you
 - Birthdays and greetings, thank yous
 - Special promotions /offers
 - Consistent, polite, persistent communication plan
- We are good
 - WOW factor - New wins, new product introductions,
 - Timely responses in context – history is important
- We want to hear from you
 - Customer surveys /ISO
 - Help desk – trouble ticketing
 - Additional requirements



Tech CRM Demo

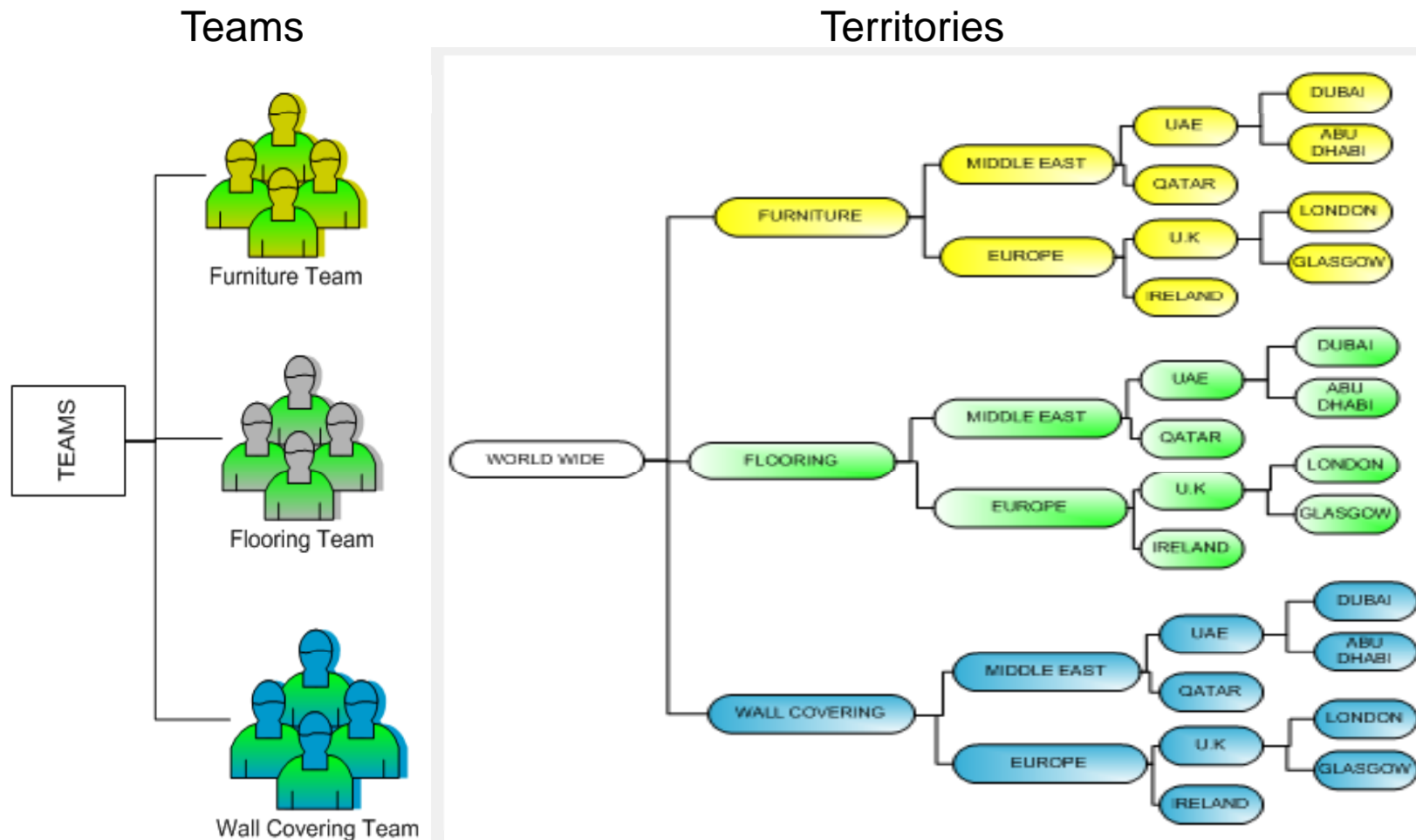
Questions?

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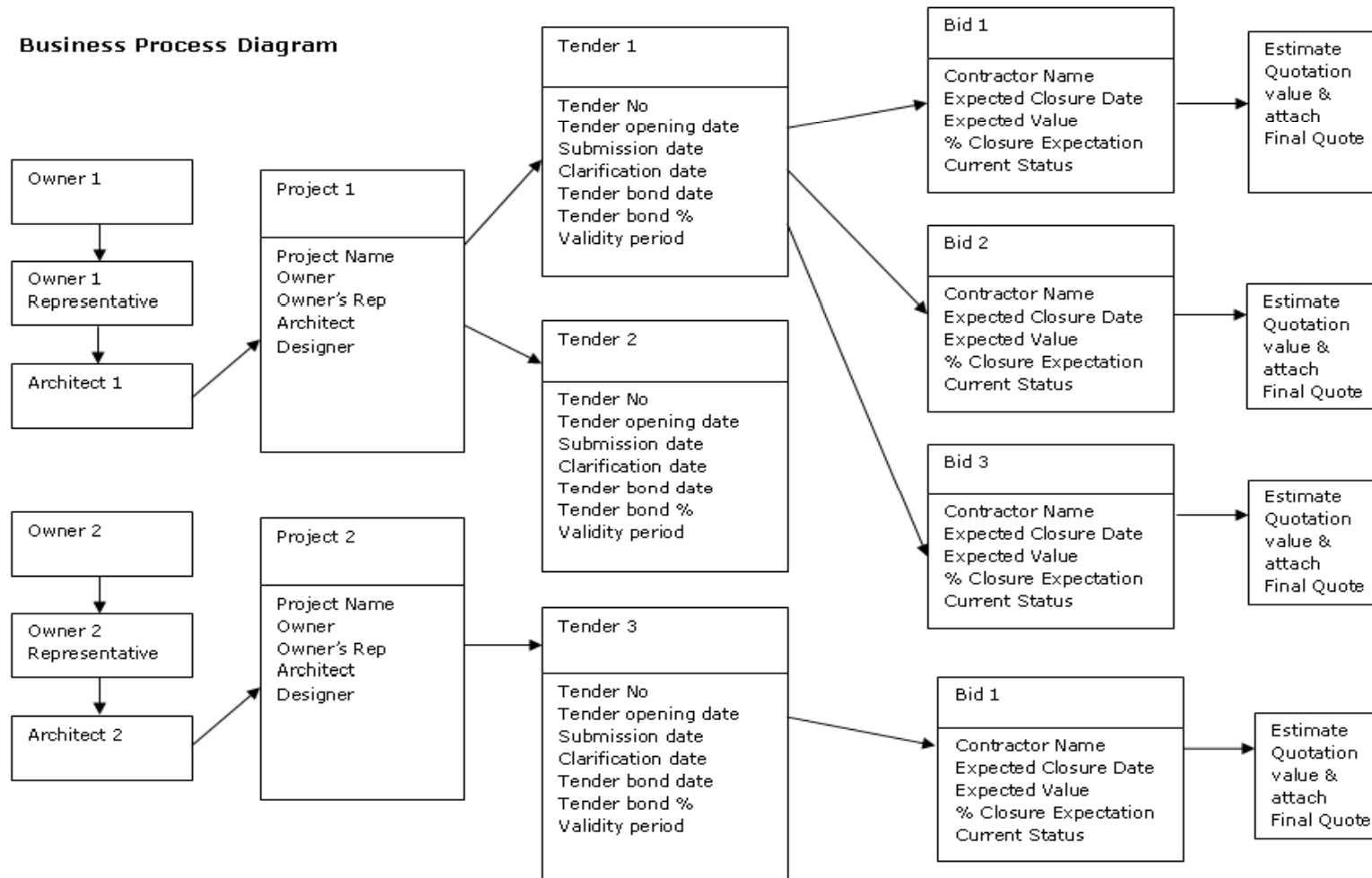


Organisation Structure

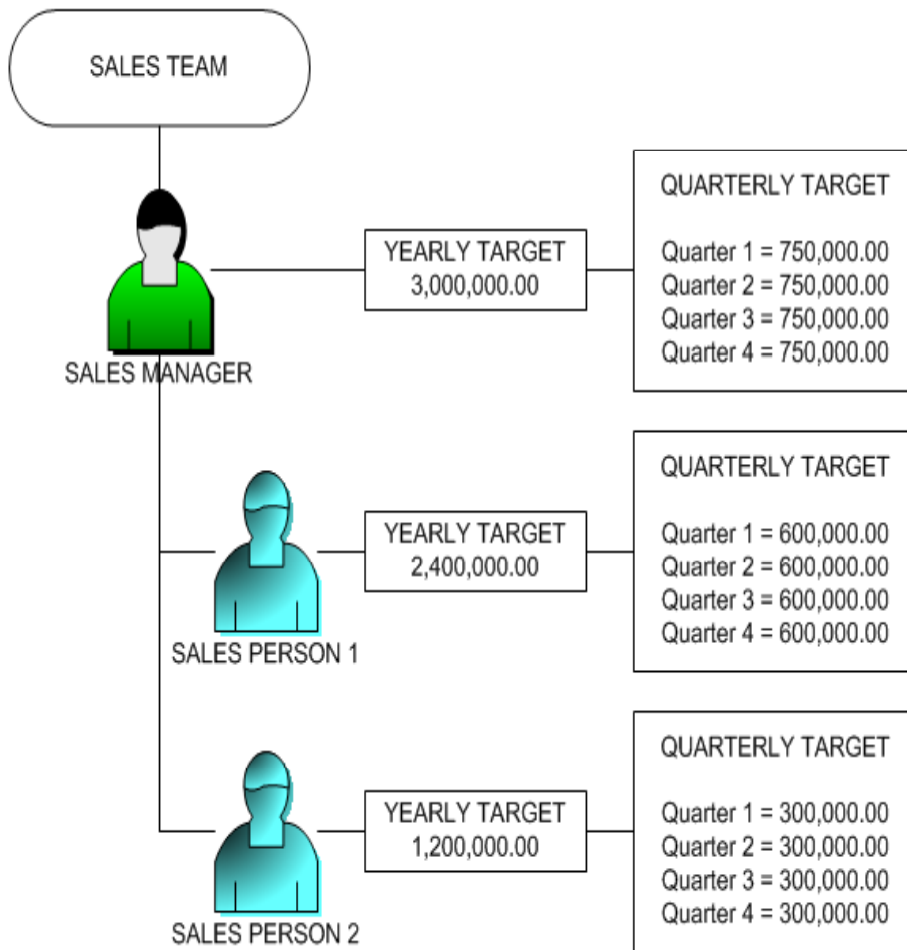


Business Process Diagram

Business Process Diagram



Sales Forecasting



Forecast Entry

Select Required Quarter: 2009 - Quarter 1 Forecast entered in: Dh

	Quota	Closed	Commit	Likely	Best Case	Pipeline
January	500000.00	100,000.00	322500.00	425500.00	425500.00	117,500.00
February	500000.00	0.00	216910.40	316910.40	316910.40	146,910.40
March	500000.00	0.00	170000.00	423250.00	423250.00	233,250.00
Quarterly Totals	1,500,000.00	100,000.00	709,410.40	1,165,660.40	1,165,660.40	497,660.40

My Pipeline

January-2009

Status	Stage	Description	Company Name	Forecast	Certainty%	Weighted	Close By	Forecast Scenario
Won	Sale Agreed	30 users	Gatecom Inc.	Dh 100,000.00	100	100,000.00	Fri-16	Commit
In Progress	Qualified	20 User Deal	Harlob Controls Limited	Dh 17,500.00	100	17,500.00	Sat-24	Commit

February-2009

Status	Stage	Description	Company Name	Forecast	Certainty%	Weighted	Close By	Forecast Scenario
In Progress	Qualified	100 User licenses	Eurolandia	Dh 209,872.00	70	146,910.40	Mon-16	Commit

March-2009

Status	Stage	Description	Company Name	Forecast	Certainty%	Weighted	Close By	Forecast Scenario
In Progress	Proposal Submitted	200 User Global Deal	Maverick Papers	Dh 275,000.00	75	206,250.00	Sun-15	Likely
In Progress	Lead	Carisse carpet for millenium hotel	3G Homes	Dh 30,000.00	90	27,000.00	Fri-20	Likely

My Direct Reports

User	Users Forecast				My Assessment		
	Quota	Commit	Likely	Best Case	Commit	Likely	Best Case
John Finch	600000.00	363504.00	521763.25	521763.25	350000.00	498000.00	498000.00
Wayne Parcels	300000.00	100705.40	186917.25	186917.25	95000.00	170000.00	170000.00

REPORTS IN ADDITION TO STANDARD REPORTS

1. Brand wise Quotations
2. Team Wise Quotations
3. List of Bids due for delivery
4. List of Bids with Tender Bond Details
5. Project Details
6. Tender Details
7. Open Opportunities
8. On Going Project Details
9. Opportunities - Won & Advance pending
10. Bids Pending for approval from design team
11. Order Delivery Date Versus Actual Delivery
12. Shipment/Arrival Due Report
13. Unmapped Projects – Projects not linked to Architects/Consultants
14. User Wise Proposals
15. Opportunities closing this quarter

