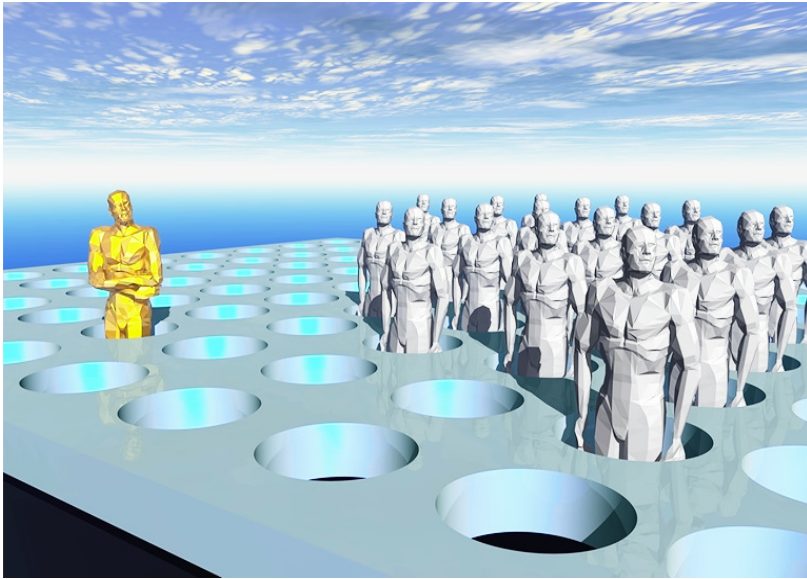


Sales Calls



Opening of negotiations with another; creating trust; demonstrating advantage; formal proposal ...

pegasus
OPERA II

*Client
Systems*

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Our Touchpoint range of software has a number of vital administrative functions built into it – generation of targeted marketing lists, campaign evaluation, contract administration, service call costing and invoicing for instance – but as a pre- and post-sales system, making and responding to calls and enquiries from contacts in prospect and customer organisations are core activities.

Contacts can be of many types; they may, for example, be in respect of on-going business; they may result from marketing activity; they may be purely speculative or they may not be connected with sales activity at all.

It is important to manage all contacts efficiently and effectively, with clear determination of any next step that is to be taken.

A vital part of our Call Management module is therefore visibility; visibility of correspondence and marketing activities; visibility of sales history; visibility of this and previous contact history; visibility of other activities taking place with this contact; access to information that can support this call. These facilities are described in our Viewpoint flyer.

To progress a call, notepad space is provided for each event that takes place, this forming an audit trail of activity. Where the call is on-going, each event needs a follow up action which is lodged in the calls diary. This can be viewed in a number of ways, but typically staff can see their “to do” lists, and managers can see the overall list of on-going activities.

During the call progression process, correspondence can be raised and recorded, and other documents such as spreadsheets, quotations and drawings registered against the call.

As a sales call progresses, its value to the company can be quantified. Entering values, margins, forecast month and probability feeds into the sales pipeline report which each member of the sales staff can use to manage leads. From this data the company’s sales forecast is produced indicating the value of business per month, per sales person and the probabilities.

In conjunction with the Marketing module, assignment of the relevant campaign and event to a call will support campaign performance appraisal and analysis.

By linking in with the Opera II quotation and order procedures, conversion reporting is available, closing the loop and demonstrating the value of a fully integrated system.

Equally, calls which do not lead to a sale or which are administrative in nature can also be logged, progressed and closed to provide an overall picture of contact activity.

The Overture Call Management module and Pegasus Opera II system are truly..

Working in concert ...

... WITH YOU