



YOUR NEEDS

Strong customer relationships are one of **the pillars of a company's success**. But maintaining control over your **sales processes**, outreach initiatives and customer loyalty programs can eat up a lot of your time and efforts.

SUCCESSFUL SALES MANAGEMENT INVOLVES



Maintaining a database of customers and leads for targeted sales operations (newsletter, follow-ups, contract renewals...)



Keeping details on customer requests and behavior to help you know what they really need



Quickly accessing real time reports (sales, number of appointments, conversion ratios, etc.)

A good CRM tool needs to be **adaptable and easy to use**, and enable the sales team to take immediate actions based on accurate, real time data.

HOW VISUAL PLANNING CAN HELP

VISUAL PLANNING helps you make your sales teams **more agile** in the way they record customer interactions and decide on what to do next.

Benefit from an original approach, combining the **best features of sales management and CRM** in a single web-based, easy-to-use and collaborative tool. All users can **save precious time** when entering, searching and validating information, enabling them to concentrate on building meaningful relationships with your customers.

“It’s a collaborative sharing tool that all our departments benefit from using, from the top of the supply chain in Germany to delivery in Saint-Egrève, France, and customer follow-up.”

Deputy IT Director – Health Sector



KEY FEATURES



FOR THE SALES MANAGER

- **Allocate an account** to a sales representative with a simple drag and drop
- Instantly **review team performance against goals** and drill down to each individual rep's activities
- Show **sales forecasts** for any given time period
- Build **custom reports** to monitor any sales indicators
- Display **consolidated views** of quotes, orders and invoices
- Fine-tune user **privileges and workflows** to align the actions of team members with company objectives



FOR THE SALES TEAM

- Manage your **leads** and **customers**, from identifying an opportunity to after-sales follow-up
- Easily schedule and **record all your sales activities** (calls, meetings, presentations, proposals, etc.)
- Quickly identify **who needs your attention now** and act upon it
- Access detailed reports to monitor your **pipeline and sales**
- Automatically **generate documents** such as quotes and proposals
- Get your agenda and all customer data **anywhere**:
in your inbox, on your e-mail calendar, or on your smartphone or tablet

THEY PUT THEIR TRUST IN US



Visual Planning is available in the cloud or on premise.
Ask us to see which model fits your organization's requirements better.

www.visual-planning.com

Visual Planning is a solution developed by Stillog IST