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.

How Visual Planning Can Help

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"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 Stilog IST