



# CRM

## Customer Relationship Management App

### Why CRM?

Every sales department needs a systematic method to gather leads, communicate with potential customers and manage the workflow from the initial sales opportunity to closing the sale. That's why we developed the RFMS CRM App.

If your sales staff is struggling with

- Keeping track of leads and prospects
- Managing your sales workflow
- Timely communication with your customers

CRM solves these issues and more from the freedom of your mobile phone or tablet. **CRM is The Missing Link.**

## Fulfills the Needs of Each Role

### Salespersons



- Organize sales opportunities with a defined workflow
- A single starting point that feeds important project requirements throughout the sales process
- Online customer portal providing quote and order status with two-way dialog
- Advanced communication with the customer throughout the sales process via a web portal, text messages and emails
- Calendar and scheduling features shared through the company
- Customer profile and history
- Internal notifications to let estimators know where, when and what to measure and estimate



### Sales Managers



- Visibility to sales process across company
- On demand reporting with trends, activity and key performance metrics in real-time

# Built to Manage Your Retail Sales Process



View and manage the opportunity "pipeline"



On demand reporting of win/loss ratios, time in each stage, days to close



Instant 2-way communication with clients



Customer's own web portal to view and manage the project



View a company-wide calendar for salespersons and estimators



Integrate personal calendar with Outlook and Gmail



Tight integration with Measure Mobile and RFMS Mobile



On demand access to historical customer activity and remarks



## CRM Meets All of Your Needs:

- ✓ Workflow
- ✓ Integration
- ✓ Communication
- ✓ Scheduling
- ✓ Reporting

### For more information on CRM

Please contact your Client Success Manager or Sales: 800-701-7367 | [sales@rfms.com](mailto:sales@rfms.com)

