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# SkyDesk CRM

A cloud-based sales support service by Fuji Xerox.

## Information Scattered everywhere

- ❑ Having information in different places or multiple systems only leads to waste of time finding them.
- ❑ There is no way to share information with the people you are working with, whether they are in Sales or Customer Support department.
- ❑ It takes more time to respond to customer enquiries.



## Unable to get a clear picture of the sales activities

- ❑ Sales team are unable to get an overview of sales activities.
- ❑ Sales team leader have to communicate verbally with the members to check on the progress.
- ❑ Not able to trace and adjust the process according to the success or failure of the sales activities.



## Problems with analyzing and collecting data.

- ❑ Manual data entry; this takes a lot of tedious human effort.
- ❑ The insufficient data to perform data analysis and reporting.



## Having trouble in using information gathered

- ❑ Poor communication with customers resulted in collecting wrong information.
- ❑ Unable to access information when out of office.
- ❑ There is no sharing of business know-how to ensure consistency in solutions for customers.



## ➤ Point 1

### Gather and share customer information and daily sales activities!

Close more deals with less time! Execute appropriate measures and decisions for higher close rate in sales. SkyDesk CRM Sales force automation help to enhance sales performance and information sharing. Effective information sharing enables manager to track and follow the progress of each deal, and prioritize sales activities with precise customer targeting.



Customer details, project progress, negotiation progress...



Importing existing data



Sharing customer data and follow up with team members

**Taro Fuji - FujiXerox Co.,Ltd.**

Contact Owner : Fx.demo11 Change

Email : xxx.xxxx@fujixerox.co.jp

Phone : +81-00-000-0000(Direct)

Mobile : +81-00-000-0001

Department : Sales Dept #1, Sales Headquarters

Territories : Assign

Contact Information

Contact Owner: Fx.demo11 Change

Account Name: FujiXerox Co.,Ltd.

Email: xxx.xxxx@fujixerox.co.jp

Title:

Phone: +81-00-000-0000(Direct)

Other Phone:

Mobile: +81-00-000-0001

**Client information**

**Detailed Information of Potentials**

Edit	Del	Subject	Tasks	Completed	Due Date	From	To	Call Start Time	Activity Owner	Modified Time
		Meeting with Taro-san on purchase		Completed	04/03/2015	Fx.demo11		03/06/2015 05:55 PM		
		Proposal & Demo		Completed	03/28/2015	Fx.demo11		03/06/2015 05:55 PM		

**Schedules and History**

**Open Activities**

Edit	Close	Follow up on updates	Tasks	Not Started	Due Date	From	To	Call Start Time	Activity Owner	Modified Time
					05/01/2015	Fx.demo11		03/06/2015 05:55 PM		

**Closed Activities**

Edit	Del	Subject	Tasks	Completed	Due Date	From	To	Call Start Time	Activity Owner	Modified Time
		Meeting with Taro-san on purchase		Completed	04/03/2015	Fx.demo11		03/06/2015 05:55 PM		
		Proposal & Demo		Completed	03/28/2015	Fx.demo11		03/06/2015 05:55 PM		

## ➤ Point 2

### SkyDesk CRM's Opportunity Tracking tool gives you a current, comprehensive view of all your sales activities

In SkyDesk CRM, standard reports are provided in various modules, which can be either used as it is or customized further as per your business requirements. Dashboards give a real-time snapshot of your organization's key metrics. You can easily visualize comparisons, patterns, and trends in sales, marketing, support, and inventory related data.

**Easy to manage data!**

**Edit Lead**

Lead Information

Lead Owner: Fx.demo11

First Name: Home

Title: Mr

Phone: 12345678

Mobile: 11223344

Lead Source: Contact

Lead Status: Contacted

No of Employees: 1

Contract closing date:

City: Singapore

**In Real-time**

**Pipeline by Stage**

Stage: Clo, Clo, Clo

**Lead Source**

Capital Finance, A & T Finance (AFF), Google Ads, Mattel Inc, Claims Financial, Money Extra DM, Shaun Lawrence, Staff Referral, Seminar, Trade Show

**Open Tasks**

Subject	Due Date	Status	Priority	Activity Type
Private appointment database	07/14/2015	Not Started	High	Tasks
Corporate Profile Survey before meeting		Not Started	High	Tasks
Follow up Go Mail	05/21/2015	In Progress	High	Tasks
Offer instructions	04/14/2015	Not Started	High	Tasks
Call to Taro Fuji	01/31/2015	Deferred	Normal	Tasks

**Today's Leads**

Lead Name	Company Email	Created Time	Staged Registration	Country
Taro Fuji	Fujixerox xxx.xxxx@fujixerox.co.jp	07/24/2015 11:00 AM	Registered	

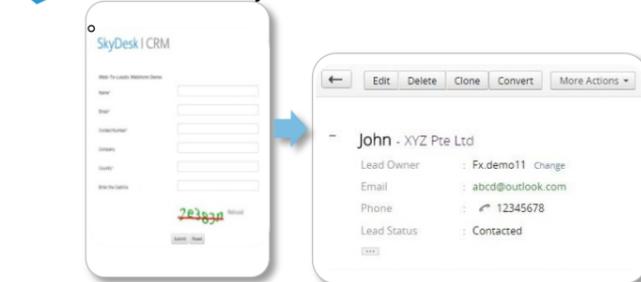
**Closing This Month**

Assistant Name	Amount	Stage	Closing Date	Account Name	Principal Owner
John	19 120.00	Closed Won	07/01/2015 9:12 PM	XYZ Pte Ltd	Fx.demo11

- ✓ Input customer information
- ✓ Update progress status
- ✓ Updating daily sales reports
- ✓ Creating new schedules and activities

## Additional Features of SkyDesk CRM

Generate and capture data from your website through **Web Forms**. Data automatically stored into SkyDesk CRM.



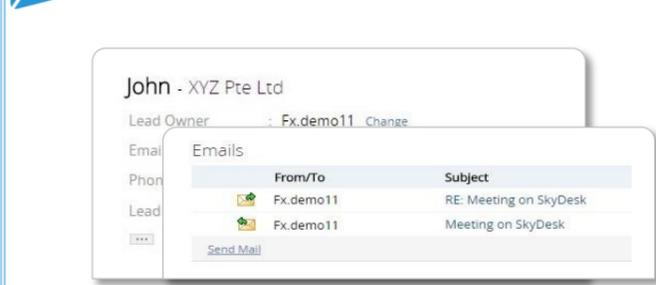
Tailor to your needs with **Customization** tool. For example, customize the page layout.



Stay connected and up-to-date wherever you go with SkyDesk CRM on your **iPad, iPhone and Android devices**.



**Email communication** through Leads/ Contacts/ Potentials modules will be recorded.



## Different types of business organizations

- ☺ Manufacturing Industry
- ☺ Business Machinery Industry
- ☺ Trading company / Distributor
- ☺ Building & Construction industry
- ☺ Software Development
- ☺ Advertising & Media Industry

## Customer Feedback

- ♪ It was **easy to use**, is **very flexible** and **customizable**.
- ♪ Their support team is very **responsive** to our needs.
- ♪ Very **user-friendly** and **affordable** CRM.
- ♪ SkyDesk CRM is **cost-effective** as compared to other CRM products.

## Benefits for different Sales Management Roles

### Upper Management

- ☺ Aggressive sales management on every opportunities.
- ☺ Able to capture and capitalize on the marketing trends with accurate forecasting.
- ☺ Real-time report on sales' performance.

### Middle Management

- ☺ Execute appropriate measures and decisions for higher close rate in sales.
- ☺ Information shared and communicated effectively with team members.
- ☺ Able to ensure consistency in the support and solutions to customers.

### Sales Representatives

- ☺ Streamline sales activities with effective data management.
- ☺ Associate and manage all sales related documents in a centralized platform.
- ☺ Reduce time on generating reports.
- ☺ Timely follow up with customers.

**Connect with Customers and Watch Your Sales grow with SkyDesk CRM!**