

SalesFlow has been designed and configured to automate lead management activities by mapping the key business processes involved in selling situations. It allows organisations to both automate and de-skill complex processes and handle greater volumes with efficient staff levels.

Why is SalesFlow essential for your business?

The system is easily configured to capture and report on as much information as you want of any data type; it has been designed to **manage your customers** in-line with **your best practice** from the very first point of contact through to ongoing account management.

Uniquely **enquiries are progressed through a series of stages** called a workflow, which reflects every step in your sales-cycle. The system provides you with strict control and visibility over all tasks relating to a prospect, with 'to do' lists of due tasks, a record of all communication history and the ability to report on all performance and activity.

SalesFlow will enable your organisation to solve many of the problems that are common to sales management;

- Clear, accurate real-time visibility of pipeline and forecasting at each stage of the cycle..
- Automate administrative tasks such as producing standard letters and quotations..
- Offer superior customer service as you know where every enquiry is in it's lifecycle..
- Spot bottlenecks and black-holes in your processes to ensure every enquiry reaches a conclusion..
- Keep up-to-date with your sales team when they, or you, are mobile..

What does it enable you to do?

SalesFlow Provides full control and management insight of the sales handling process:

Capture every prospect enquiry

You can immediately capture structured details of every prospect, rules based automation then allows sales opportunities to be processed quickly and efficiently.

Respond to every enquiry efficiently

Based on your business rules, the sales team and anyone else involved in handling a customer enquiry can quickly assess the customers' requirements and respond as soon as possible, sometimes whilst they are still on the phone.

Convert enquiries to customers

SalesFlow will transfer your best practice business processes into an automated model, allowing your whole sales team to smoothly move leads along the sales track.

Easily manage everyday tasks

Each stage in the process is mapped out ensuring that each task is fully completed, ownership is also assigned to provide accountability. Reminders for ring-backs and follow-up actions are highlighted and brought to the attention of users.

Know exactly which stage a sales enquiry is at and its history

SalesFlow sets processes in place that guarantee every step of the sales process and every contact with a client is recorded. This ensures all users can quickly ascertain a client's situation allowing them to confidently and quickly deal with any enquiry.

Automate the production of documents

Documents can be produced from any data captured within your system. Information can be merged into standard templates to produce quotations, standard letters or general communications.

Excellent customer service

Build strong customer relationships through informed, consistent quality contact. Customers can be dealt with in an efficient and professional manner by all users as customer communication and enquiry details are accessible to all who need it.

Real-time reporting for sales activity

SalesFlow provides managers with an up-to-date overview of business activity and an understanding of where the majority of work is coming in from, how many leads are being dealt with and how many of them have been converted or lost.

Grow your business through real intelligence

As every event is recorded in set stages, it is possible to make informed decisions when looking at areas where business has been lost, where the sale stalls or indeed, by providing an accurate sales forecast or pipeline overview.



"The **sales team love** it and say it is the best tool they have ever had. If a customer rings in or if they are going to a meeting they can see **exactly what stage a client's quote** or customer service issue is at.

We can now look after our customers better than ever before **as a result of using SalesFlow, we have also achieved a strong year-on-year growth** with a healthy profit growth above the industry average."

Shaun Mason
Sales Director
Tecan Manufacturing



"SalesFlow's strength is the degree to which **tasks can be automated!**

The cost of deploying SalesFlow is **one of the lowest** we have seen."

Butler Group
Analysis without compromise

SalesFlow Overview

SalesFlow is currently used across many vertical industries including Manufacturing, IT and Telecommunications. If you have a complicated sales management process that would benefit from being automated or if you want clear visibility of your sales pipeline at every stage of the sales-cycle, SalesFlow will meet all these needs.

Who should use it?

It is ideally suited for any company that needs to track and control progress of customer and prospect enquiries through a workflow, with defined stages, variable routes and time-dependent operations. This system has multiple applications, with the number of options only constrained by your requirements.

How is it accessed?

SalesFlow is a hosted system accessed via the internet, enabling authorised users to access the system wherever they are located whether at home or abroad. It works from a central database, meaning there is no need to synchronise changes and managers always have an up-to-date view of their sales teams and customer's progress.

What does it look like?

The web interface has been designed to be easy to read and enable anyone at any level in the organisation to navigate around a simple screen. A familiar look and feel allows users to quickly become comfortable with the interface and makes training easier and quicker. You will be able to instantly recognise everything in the activities and history as the phraseology will relate to the everyday language of your organisation.



Case Study: The Debt Advisor



The Current Situation

Over 23,000 people took out IVA's in 2005 with the market set to grow by over 400% to 100,000 by 2008 with the government's proposal for new streamlined IVA's. To manage the increased number of customers, Insolvency Practitioners are investing in SalesFlow from Sawfish Software.

The Client

With such alarming statistics, Beverly Budsworth, formerly of Deloitte and Touche, set up The Debt Advisor six years ago, a Manchester based Insolvency Practice which deals with; refinancing, Debt Redirection, Individual Voluntary Arrangements and Bankruptcy.

The Problem

The company's systems and processes needed updating in order to cope with the huge amount of interest The Debt Advisor's services were generating. The existing database lacked functionality for reporting on the progress of complex inbound enquiries, what conversion rates had been achieved or the cost of acquiring a new client.

Manual, daily updates were time-consuming, profitable opportunities were missed and, due to the financial nature of the Company's activities there were a number of strict processes that needed to be adhered to. They needed a system that could record, display and report on information relating to customers through every stage of their case.

The Solution



"We invested in SalesFlow nearly two years ago because it matched all our requirements from a software package; it really was the only solution with the functionality and configurability to meet the needs of the business.

SalesFlow allows us to record everything in one easy to use system with important information relating to each client case available at any time to any one of our team. Our business has improved dramatically since we implemented SalesFlow." said Beverly.

Conclusion

Beverly says "SalesFlow has been a massive factor in the development of The Debt Advisor, the software has increased our profitable growth, it is clear that we have benefited from it because we have taken on three new members of staff whose sole job is to manage all the incoming leads!"

Key Benefits

- Respond to enquiries efficiently
- Convert enquiries to customers
- Easily manage everyday tasks
- Enables quick decisions on sales proposals
- Know where customers are in the sales cycle
- Deliver excellent customer service
- Grow your business through real intelligence

Key Features

- A hosted, web accessed solution
- Client enquiry forms
- Workflow driven.
- Mail merge for document production
- Central database
- Tree view for instant reporting
- Automated best practice
- Automates time intensive tasks

Key Clients

- Grant Thornton UK LLP
- The Debt Advisor
- Tecan Manufacturing