



BUSINESS LEAD MANAGEMENT MOBILE APPLICATION

Client

Business lead services

Business Overview

- Focus on relationships with individual people – whether those are customers, service users, colleagues or suppliers.
- Mobile CRM application free the sales persons from using desktop and carrying a tablet or smartphone can ease them to Access and update leads, contacts and opportunities.
- Helps the sales team to plan the day with getting the lead information's in and around the area they are visiting for sales, also help them to fill the form, upload and share files including images and e-signature of the customer.
- This also provides with a means to track field activity of the sales team through GPS.

Business Challenge

- Re-architecting customer-facing processes
- Selecting technology
- Accurate view of customers across all departments

- No visibility into marketing success via closed loop reporting
- Not able to track the sales person field activity and hence ended up with fake details

Approach / Solution

- Sales team easily accessed the leads and registered their customer information from their sales location.
- Can immediately upload customer images, information and their signature. Hence the leads and sales are closed immediately without any delay which increased the sales.
- Able to track the field activity, manage the sales team and able to boost up their performance using rewards and commissions.
- Every salesperson has the benefit of complete CRM data, analytics and customer-facing material at their fingertips, on any device – freeing them to spend more time on sales and less on administrative tasks.
- Distributed teams can share files and background information and can update, share and send proposals on the move.

KAT Enterprise is US based Information Technology & Software Services Company with offices in US and India. We work with clients in Finance and Insurance, Manufacturing, Healthcare, Retail and Federal Governments with their key business and Technology challenges.

Benefits

- **Improved Efficiency.** Improves the quality and timelines of the customer data - Making it easier for mobile users to input data means more data will be added to the customer record, and therefore data will be more timely, accurate, and complete.
- **Increases customer satisfaction.** Through greater responsiveness from the field professional and customer service and support, especially through streamlining urgent questions and requests onto the appropriate parties.
- **Increases revenue for field sales teams.** By moving opportunities through the pipeline more efficiently. And, these greater efficiencies and productivity mean that the mobile sales professional has the flexibility to visit more clients and close more deals, sooner.
- **Facilitate Data Access.** Employees who are working away from the office often need more information about a customer than just a name and contact details. Mobile CRM systems allow employees to access all data stored in the customer's account, including information about the customer's previous interactions with the company.
- **Boost Productivity.** All the benefits of a mobile CRM system combine to create a significant boost in productivity. When salespeople can quickly access the latest information about a customer, they are more likely to deliver service that directly meets the customer's needs.

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