# Salestrakr
## *Simply Powerful CRM*

## CRM FOR REAL PEOPLE

CRM, or Customer Relationship Management, is a discipline of most companies. They keep track of and reach out to those they sell to and after they win them, they take care of them. Or, they're supposed to. Without the right tools though, either they struggle doing a good job or they just don't bother.

Many of us in the sales world got our start with CRM using a PC-based software package. It was typically highly customized. And it was quite difficult to synchronize this software with others on our team. Our sales managers were always upset at the lack of completeness in the CRM. Our sales administration assistants were always upset that sales reps didn't seem to know when to sync. When laptops were lost, so were any updates that had not been synchronized. Software updates were difficult too.

Even the move to big ticket systems didn't seem to help. Sure, we paid a fortune to ensure these systems were fully integrated with other corporate systems. We had workflow, business rules, reporting engines and screen templates. However, there were also dedicated IT people, long delays in getting the systems updated, continuous problems reaching the CRM through the VPN, costly software maintenance and sheer frustration from the sales personnel.

Now, we've moved to "the cloud". No more software installation, web-based screens, no VPN and access from a computer and phone. But, the costs per month are still high. Consultants are still needed and as always, cloud-based CRM still seems designed for reports hungry senior managers, not for eager sales people. Back To Basics! We really need to help sales people reach clients. To identify opportunities. To record those opportunities. And then to repeat the process. Success has a way of removing the need by management to over manage the process.

### Sales Success

Sales success requires information. Most CRMs have great databases yet make it hard to populate and search those databases. Speed and intuitiveness are the best ways to help sales people help themselves and management. Reduced CRM complexity means more information and greater usage.

## In Steps Salestrakr CRM

Salestrakr CRM was created by sales people for sales people. It is designed to focus on prospects and the opportunities they bring. Can it be integrated with back-end systems? Yes! Can it be a valuable tool for management? You bet. But, first and foremost, Salestrakr is a contacts and opportunities management tool for sales people and business owners. And a great one at that.

## It's The Little Things

Salestrakr features an "edit in place" user interface. Salespeople can just click on text, change the text and then press enter. DONE. They can click on a telephone number and immediately invoke Skype to make a call. They can click on an email address, pop open a web email screen, chose a template, grab a corporate document as an attachment and then hit send. Automatically, the outbound email can be found under that contact's profile. All without ever leaving Salestrakr. All with ease.

## Sales is In The Name

Salestrakr features advanced search and marketing automation tools. Most of all though, Salestrakr allows for the creation of a custom pipeline definitions, ensuring Salestrakr matches the business processes a company employs. These can be created in minutes without the need for an IT person or consultant saving both time and money.
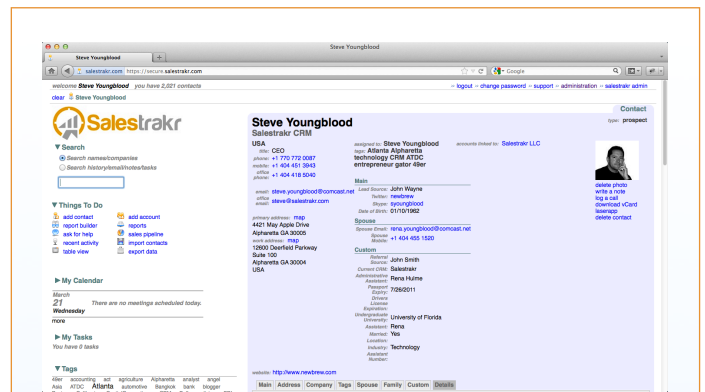


## A Simple Interface

Salestrakr CRM was built using the latest user interface technologies. Use any browser you like. Windows or Mac. Search for all contacts tagged with the keyword "golf" and send them the latest information on your company's golf outing, with ease. Need to find a contact fast? Salestrakr CRM's Active Search starts showing results as you type, not after you press "submit". Further, almost everything you need to see in Salestrakr CRM is on one page. This helps a salesperson find a contact, call them and then note the interaction. No "click and wait".

# Key Salestrakr Features



- **Sales Opportunity Management -** Define your pipeline stages and easily allow for the creation and management of associated sales opportunities
- **Meetings Management -** The Salestrakr Calendar allows for the creation of contact specific meeting in a calendar, right next to a detailed contact profile
- **Notes -** Salestrakr contact notes can be noted as logged telephone calls or just notes or updates
- **Tasks -** Tasks are contact specific and can be assigned and re-assigned with ease
- **Emails -** Emails can be sent from Salestrakr or with a client application such as Outlook or Apple Mail with Salestrakr's Dropbox ensuring all email interactions show in Salestrakr in the correct contact profiles
- **Contacts Management -** Complete record of contact profiles, including contact details, family and dependents details. Extendable via custom fields including date, currency, number, text, phone, URL, email and dropdown field types.
- **Tagging -** Keywords can be associated with contacts and accounts allowing for easy grouping and search