Sales Pipeline Management

Total control over customers and prospects

The ability to win new customers and successfully manage existing ones is an essential part of growth. As part of the Opera II CRM suite of modules, Sales Pipeline Management is a an end-to-end solution which can help businesses develop more profitably and increase customer satisfaction by promoting long-term relationships.

New Business

Opera II allows you to capture prospect and contact information, identify the opportunity and closure probability, manage the relationship process through the entire sales cycle, report on their profitability and increase your business potential with them, all from one complete solution. The sales cycle can be a long and complicated process and it's easy to lose prospects in the sheer volume of activity your sales and marketing people are generating in order to find new customers. Opera II Sales Pipeline Management (SPM) helps to streamline your procedures and manage the progression from prospect to customer, so that you will never lose sight of an opportunity or customer again.

Intelligent Forecasting and Reporting

The ability to track opportunities and accurately forecast against them is essential to business growth. At the touch of a button, Opera II SPM builds a full, clear picture of the sales pipeline and the value of those opportunities through the sales funnel, broken down by owner, contact, referral method, sales type and area.

The powerful reporting ability of XRL combined with intelligent alerting allows you to report on all aspects of the sales cycle and analyse any other area of the business using Microsoft® Excel.

Total Accountability

Once a prospect becomes a customer, Opera II can convert the record into an account so you can immediately process orders against them, or convert quotes to orders in SOP.
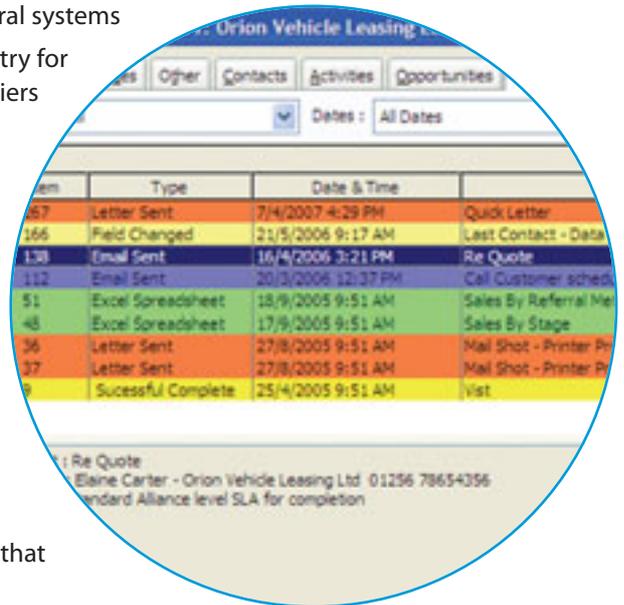
The cycle is completed with the ability to continue to log activity such as mailings, conversations, tasks and promotions to existing customers in order to manage these more effectively.

Remote Access

When your sales team is out on the road, it is essential to be able to manage Sales Pipeline Management data on the move. SPM Remote allows users to download data on to their laptop which can be controlled by entering the criteria required. Users can edit and amend contact details and histories, then synchronise the changes back to the central office via the Internet.

Key Benefits

- Eliminates the need to maintain data on several systems
- Maintains company details: single point of entry for new prospects and existing customers/ suppliers can be cross-referenced from the Sales/Purchase ledgers
- Maintains unlimited contact details (including site addresses) within a company
- New contacts can automatically update your Microsoft® Outlook address book
- User-definable fields and look-ups for Contact, Company and Opportunity forms
- Send e-mails/e-shots and import incoming e-mail from Microsoft® Outlook 2003
- Record notes and history against a contact
- History is automatically updated by activities that take place such as letters and mailshots
- Record and track sales opportunities against a contact
- Quotations can be generated and associated with a sales opportunity
- Book appointments with a contact. These can be added automatically to your Outlook diary and recorded against the contact's history. Log 'to do' tasks against contacts, opportunities or contracts
- Send e-mails via Microsoft® Outlook for a contact or group
- Generate mailshots (using Microsoft® Word) for lists of contacts/groups
- Convert prospect/quotation details to live customer/sales orders
- Sales and Activity reports
- Import or update existing customer and supplier records from the Opera II Sales and Purchase Ledgers
- Remote access, for salespeople on the move