

KEY FEATURES

- Opportunity Management
- Forecasting & Pipeline Analysis
- Sales Workflow Automation
- Lead Generation & Routing
- Team Selling & Management
- Dashboard Analytics
- Inventory & Quotes
- Competitor Intelligence
- Source Tracking
- Lookups & Groups
- Integrated E-Mail and Fax
- Automated Business Triggers
- Productivity Analysis
- Sales Stage Tracking
- Partner Opportunity Management
- Knowledge Base
- Win/Loss Analysis
- Literature Fulfillment
- Cross-sell and Up-sell Analysis
- Integrated Marketing and Customer Service
- Web Resources for Research
- Back-Office Integration
- Analytics & Reporting

Increase Profitability

To achieve peak performance, sales teams need easy-to-master tools which provide accurate and effective results that translate into increased revenues and profitability. Surado CRM includes the features salespeople need to provide a consistent approach that drives sales.

Manage Accounts

With Surado CRM, sales professionals can manage customer accounts throughout the sales cycle. Capitalize on a comprehensive view that includes contact information, correspondence, opportunity and forecasting data, literature and presentations, quotes, orders and post-sale service history, to build lasting relationships and profit from cross-sell and up-sell opportunities.

Surado CRM provides a true 360-degree view, allowing a contact's relevant back-office financial information to be viewed directly.

Capture & Qualify Leads

Profitable sales begin with qualified leads. Surado CRM allows you to import data from lists or capture leads from a web site through the eLeads module. Track inquiries and route leads to qualified representatives or partners. Then create automated processes to distribute literature and schedule follow-up activities.

To help ensure consistency and appropriate resource allocation, Surado CRM allows you to set conditions that must be met before opportunities advance to later sales stages.

Forecast, Plan & Strategize

Managers can rely on Surado CRM to get real-time answers about sales reps' activities and pipelines. Manage multiple product pipelines, each with their own sales stages, to better plan and position to meet company goals. With competitor intelligence features, identify strengths, weaknesses and past performance to gain a competitive edge.

Comprehensive Inventory & Quoting

Surado CRM includes a fully-featured inventory system with multiple part numbers, vendor information, kits and price levels. Create quotes with discounts and merge information into Microsoft Word or Excel. Surado CRM even allows you to turn quotes into sales orders and transfer them to back-office systems.

Customer Lifetime Value

Companies that track customers' purchasing habits are better equipped to maximize profitability. Surado CRM provides customer lifetime value tools to analyze a customer's actual and potential value over time, identifying the strongest accounts and allowing offerings to be adjusted to improve effectiveness.

Connect Mobile Staff

Your sales team needs "anytime, anywhere" access to critical account, opportunity and product information in order to be competitive and close sales. With Surado CRM Offline, mobile users can access complete customer information through a separate disconnected laptop solution. Armed with this data, sales professionals are always equipped to take advantage of unexpected opportunities. And with Always-In-Sync™, your mobile staff stays up-to-date with ease.

Surado CRM can also synchronize contact and schedule data with Palm™ and Pocket PC devices, including PDAs and mobile telephones, or salespeople can access critical information with any Internet connection, through web-enabled modules.

**Review customer leads
and target the most
profitable accounts.**

