

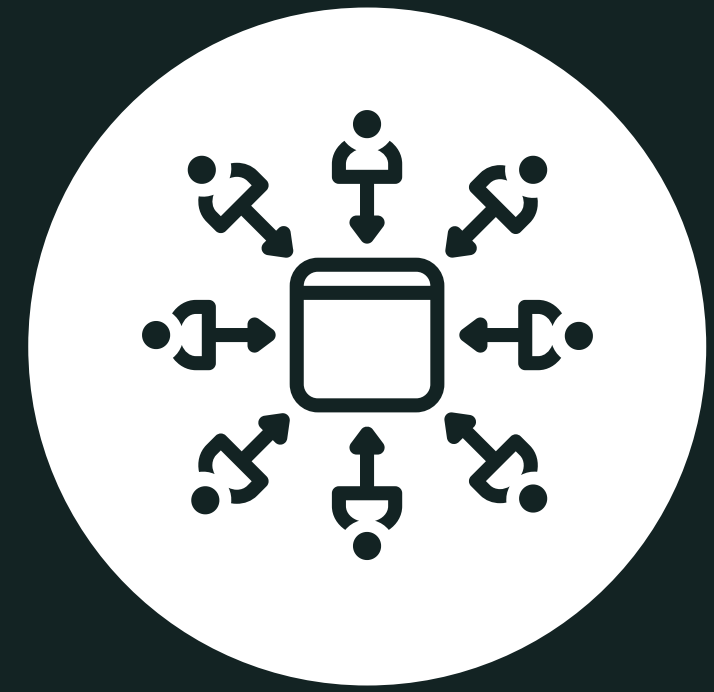
ROI 360's Cutting-Edge CRM Features

Explore ROI 360's advanced CRM features designed to optimize your sales process, enhance lead management, and streamline customer interactions efficiently.



Maximize Sales Efficiency

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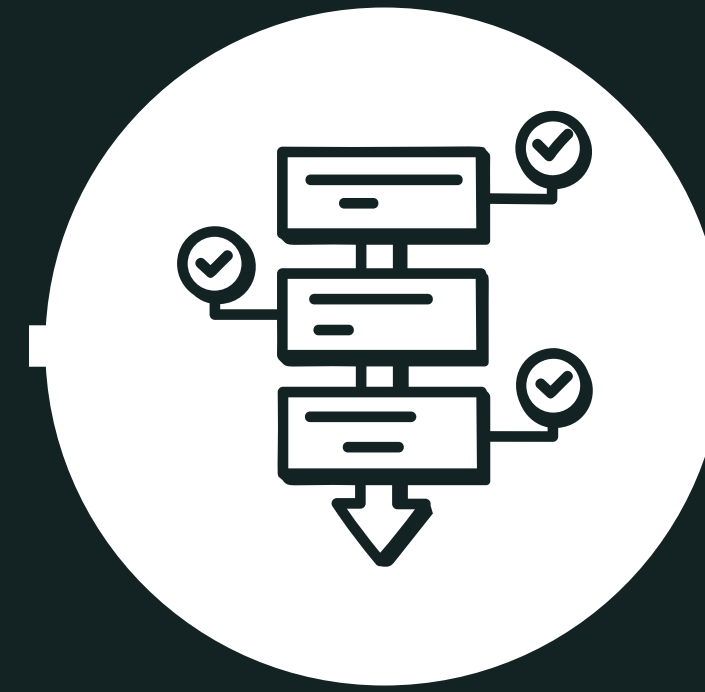
1. Lead Automation

Seamlessly convert interactions from emails, social media, and events into potential leads.



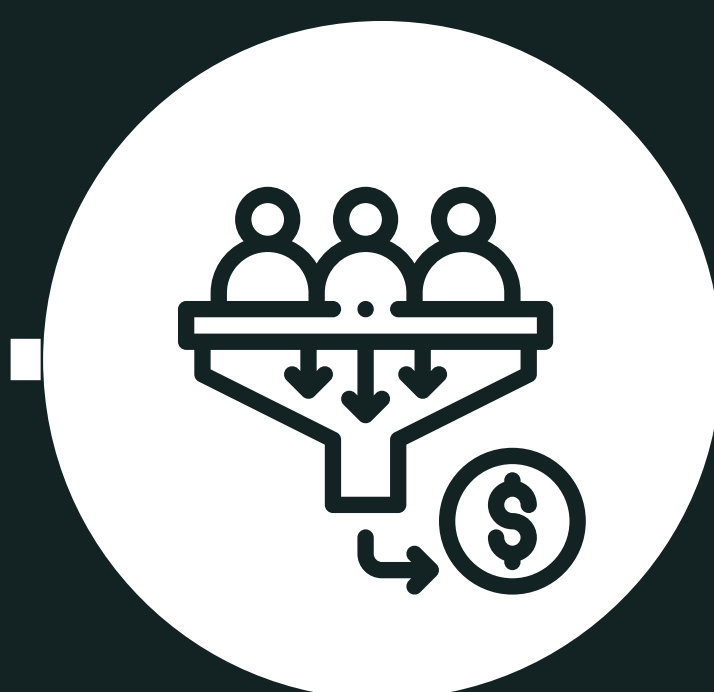
2. Fast Quoting

Send and manage sales quotes in just a few clicks, optimizing your sales funnel.



3. Organized Tasks

Automatically queue planned calls for a smooth transition between sales activities.



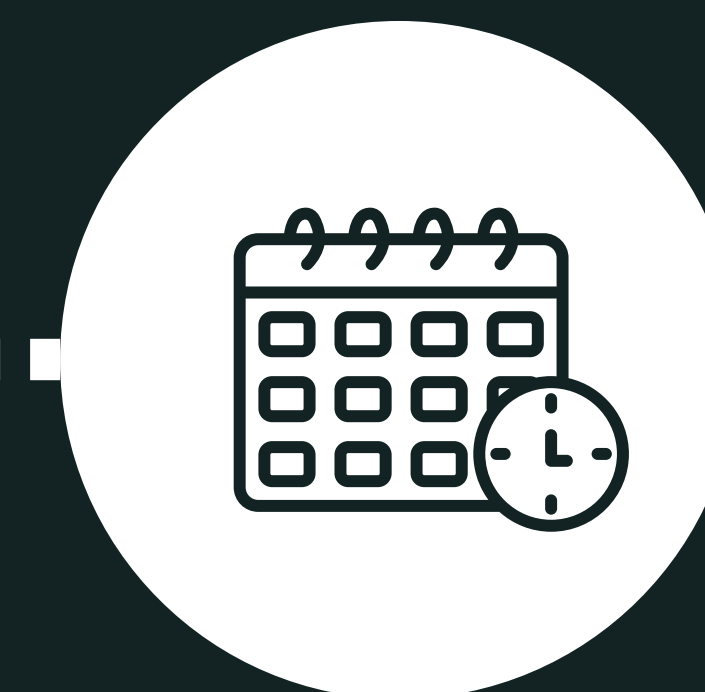
4. Pipeline Management

Easily manage your sales pipeline with a drag-and-drop interface for streamlined operations.



5. Inbound Leads

Automatically create leads from website visitors, support tickets, and VoIP calls.



6. Efficient Scheduling

Ensure smooth transitions with queued calls, minimizing downtime between sales tasks.

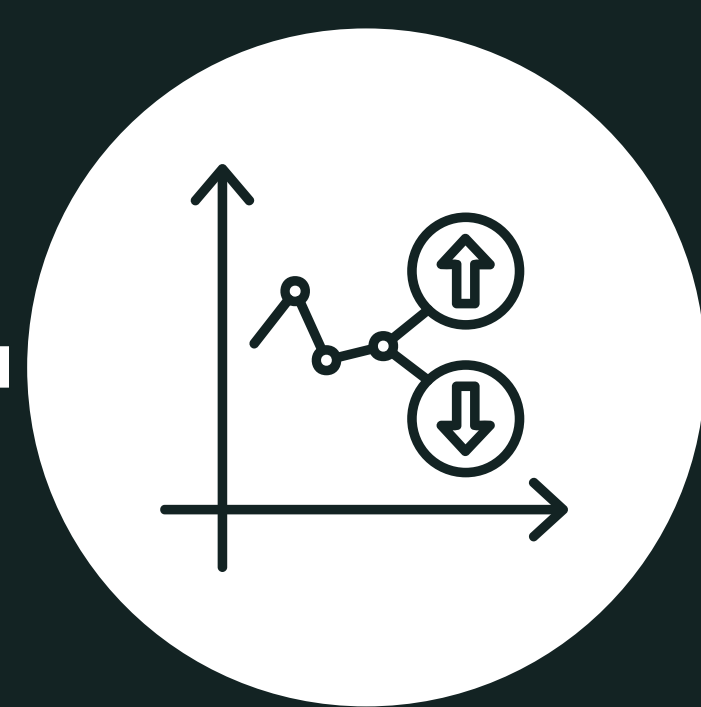
Nurture Leads Effectively

2



1. Tailored Emails

Automate campaigns to send emails matching lead activities and segmentations.



2. Predictive Scoring

Use past performance to calculate the success probability of each lead.



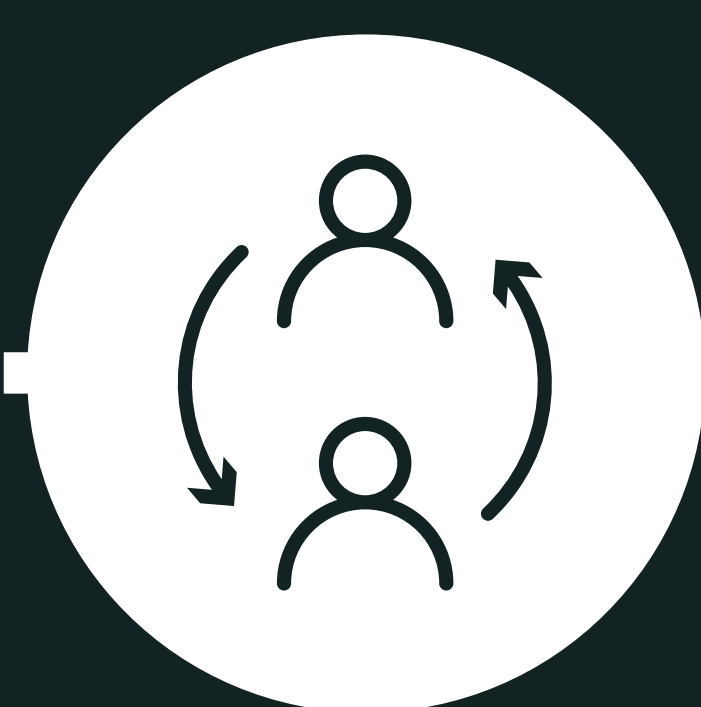
3. GeoIP Detection

Automatically identify the geographical details of leads from their IP addresses.



4. Real-Time Chat

Engage visitors with live chat, boosting lead conversion through immediate interaction.



5. Smart Deduplication

Automatically suggest potential lead merges when converting leads into opportunities.



6. Automatic Allocation

Assign leads to the appropriate sales team or representative based on predefined rules.

Optimize Opportunities

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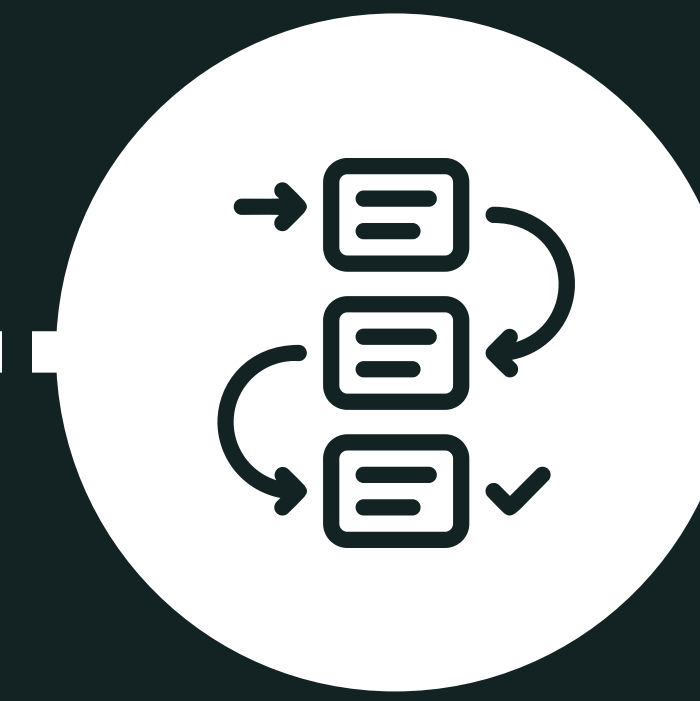
1. Efficient Calls

Organize and schedule calls efficiently, ensuring meticulous logging and quick follow-ups.



2. Visual Pipeline

Get a clear, visual overview of your opportunities with a drag-and-drop interface.



3. Custom Stages

Add descriptions and customize stages within your pipeline for tailored management.



4. Meeting Scheduling

Set up meetings directly from opportunities, sync with calendars for seamless integration.



5. Action Planning

Plan and prioritize daily tasks based on the significance of opportunities.



6. 360° Visibility

Access comprehensive information on opportunities, including web interactions and historical data.

Enhance Customer Engagement

4



1. Unified Contacts

Maintain a clear and shared address book accessible by all sales personnel.



2. Custom Preferences

Easily set and adjust customer preferences such as language and delivery options.



3. Versatile Contacting

Manage multiple addresses and contact details for each customer company.



4. Activity History

Access a complete history of customer interactions including opportunities and orders.



5. Template Creation

Develop email templates for common communications, enhancing response efficiency.



6. Seamless Communication

Utilize integrated VoIP for easy calling, automatic logging, and follow-up action scheduling.

Streamline Insights & Integrations

5



1. Personalized Dashboards

Build and customize dashboards to visualize sales KPIs and share insights with teams.



2. Deep Dive Analytics

Utilize advanced filters and drilling options to analyze your opportunity pipeline thoroughly.



3. Trend Detection

Track key performance indicators over time to identify and act on emerging trends.



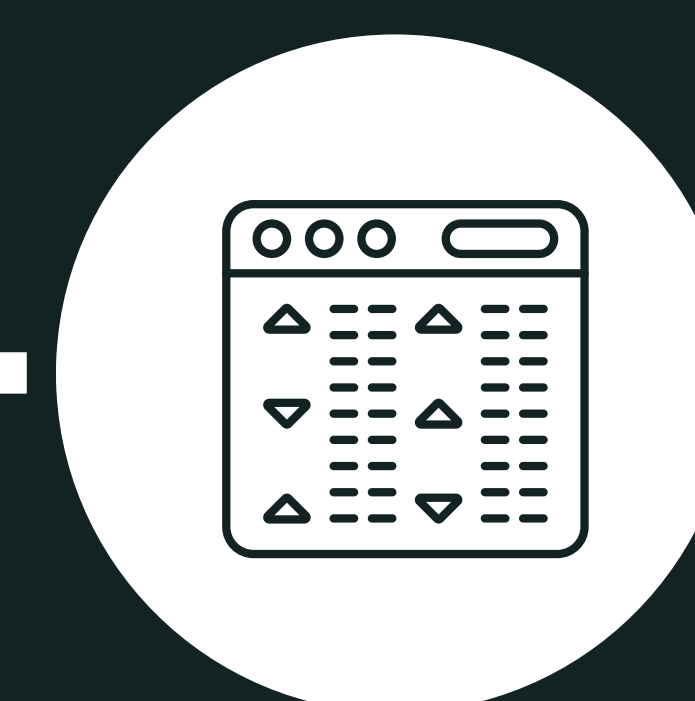
4. Lead Statistics

Evaluate the effectiveness of marketing campaigns with detailed statistics on lead sources.



5. Efficient Conversions

Quickly convert opportunities into quotes, seamlessly integrating customer history views.



6. Real-Time Inventory

Access real-time product availability within quotes, and monitor delivery statuses from orders.

