Lightspoke Solution Tour: Sales CRM

Lightspoke Now!

Lightspoke Sales CRM is a hosted CRM solution for sales force automation, customer relationship management. Because Lightspoke is delivered as a hosted service, sales organizations do not need to lose valuable time supporting and managing technology. As a web application, Lightspoke is as intuitive as the web and offers a gradual learning curve. This allows customers to focus on their business, not constantly training new sales reps. With CRM management, companies can begin to strategically manage their sales activities, resulting in higher volume and profits.

The benefits of using Lightspoke Sales CRM are immediate:
Extensible CRM Applications
Instant Deployment: 1 Day
Quick ROI: Within 30 Days

Focus on Selling

Lightspoke Sales CRM provides your sales team with a 360 degree view of your customers accounts. Close more deals with Lightspoke by:

1. Optimizing your sales pipeline
2. Identifying stuck opportunities
3. Prioritizing and qualify leads

Since Lightspoke is an application service provider, there is nothing to install and minimal training required. Your group can be up and running within the day. Furthermore, upgrades are transparent and customization support can be offloaded.

Access Sales Information Anywhere

Gone are the days of calling into the sales office to get price lists, status updates, etc. Now with Lightspoke Sales CRM, your mobile sales team can get all the benefits of CRM on the road. Increase your people's productivity on the road.

Benefits

Don't let opportunities slip through the cracks! Since every lead is immediately recorded, no opportunity goes unnoticed. Also, stuck opportunity reports tell identify opportunities that are slowing down.

Better Team Selling. Every member of your sales force can immediately get up-tp-date on any customer. Your sales team can now collaborate better on large deals that require multiple sales reps.

Better Customer Management. Easy access to real-time sales information for everyone enables collaboration between sales, service, and marketing. With instant access to all customer communication and data, you can collectively manage customer relationships across your entire organization.

Better Forecasting. Once you begin using Lightspoke Sales CRM, your sales pipeline and accounts becomes transparent and always up-to-date. No more broad stroke guesses at what the end of the month will turn out!

Understand Your Sales Cycle. Time based reports of your historical sales activities can help you identify bottlenecks in your sales process. Lightspoke Sales CRM allows you to understand your sales process and meet strategic milestones.

Grand Tour

The Lightspoke Sales CRM application comprises over 50 database tables, views / reports forms and tasks. However, the best way to work with all of these objects is through the Sales CRM dashboards. The dashboards tie all of the Sales CRM objects together in a convenient and easy to use interface.

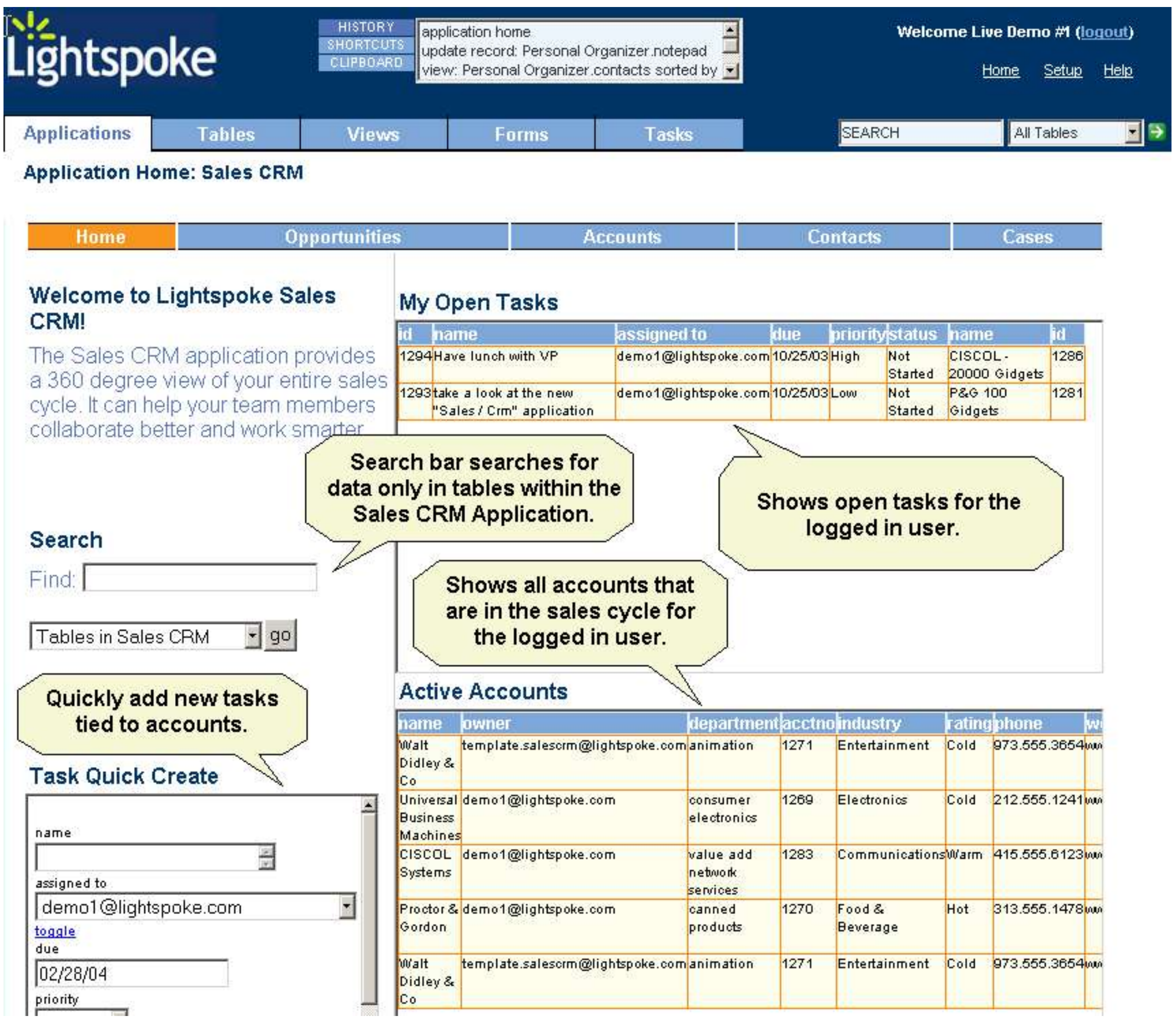
The dashboards are as follows:

- Home (Activity / Tasks)
- Opportunities
- Accounts
- Contacts
- Cases

Task Management

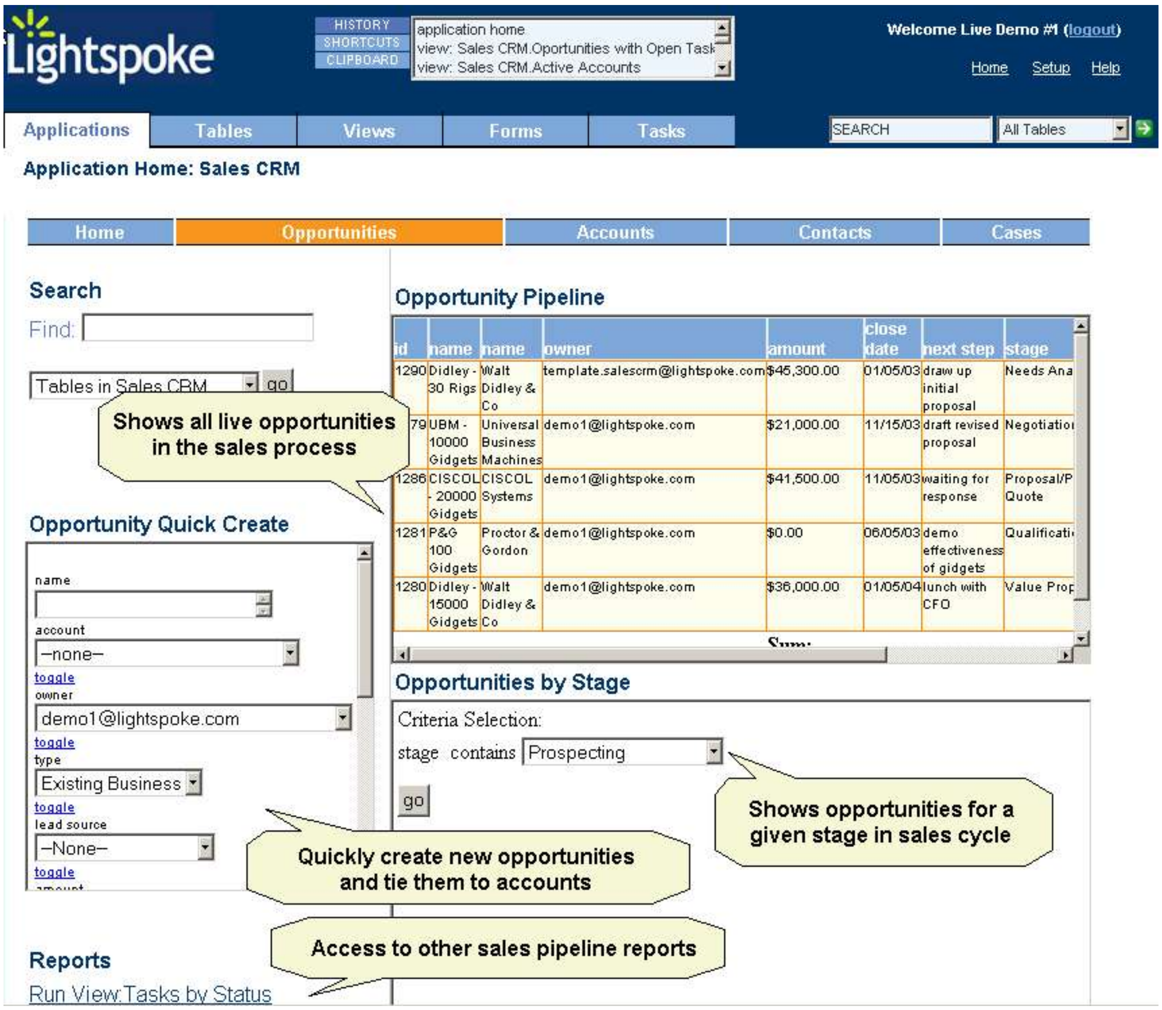
Help sales teams collaborate by assigning tasks tied to accounts. Track all account-related activities tied to individual sales reps. Identify ownership and accountability on all sales opportunities.

The *Home* dashboard of the Sales CRM application is designed for individual activity management. The *My Open Tasks* panel shows a "to do" list for the individual who has logged in. The *Active Accounts* panel shows all of the accounts that have activity owned by the sales rep who has logged in. On the left, the *Task Quick Create* panel allows the user to enter in a new task and tie the new task to an account.



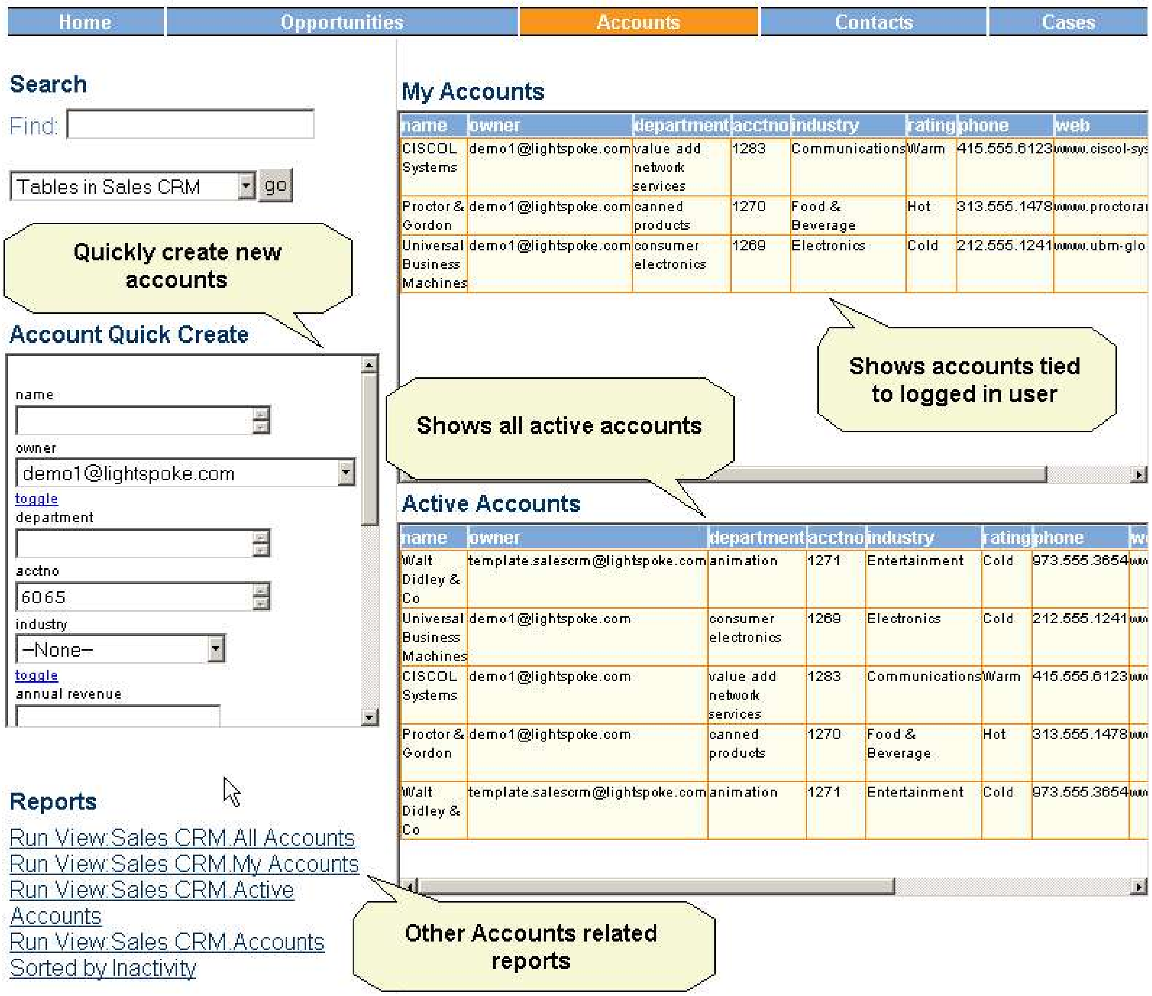
Opportunity Management

Manage your sales pipeline by getting a real time look at all the live opportunities in your organization in the *Opportunity Pipeline* panel. New opportunities can be quickly added here and tied to existing or new accounts. *Opportunities by Stage* lets you view only opportunities in a particular stage of your sales cycle. For instance, if you wanted to know all the opportunities in the "prospecting" or the "proposal submitted" stage.



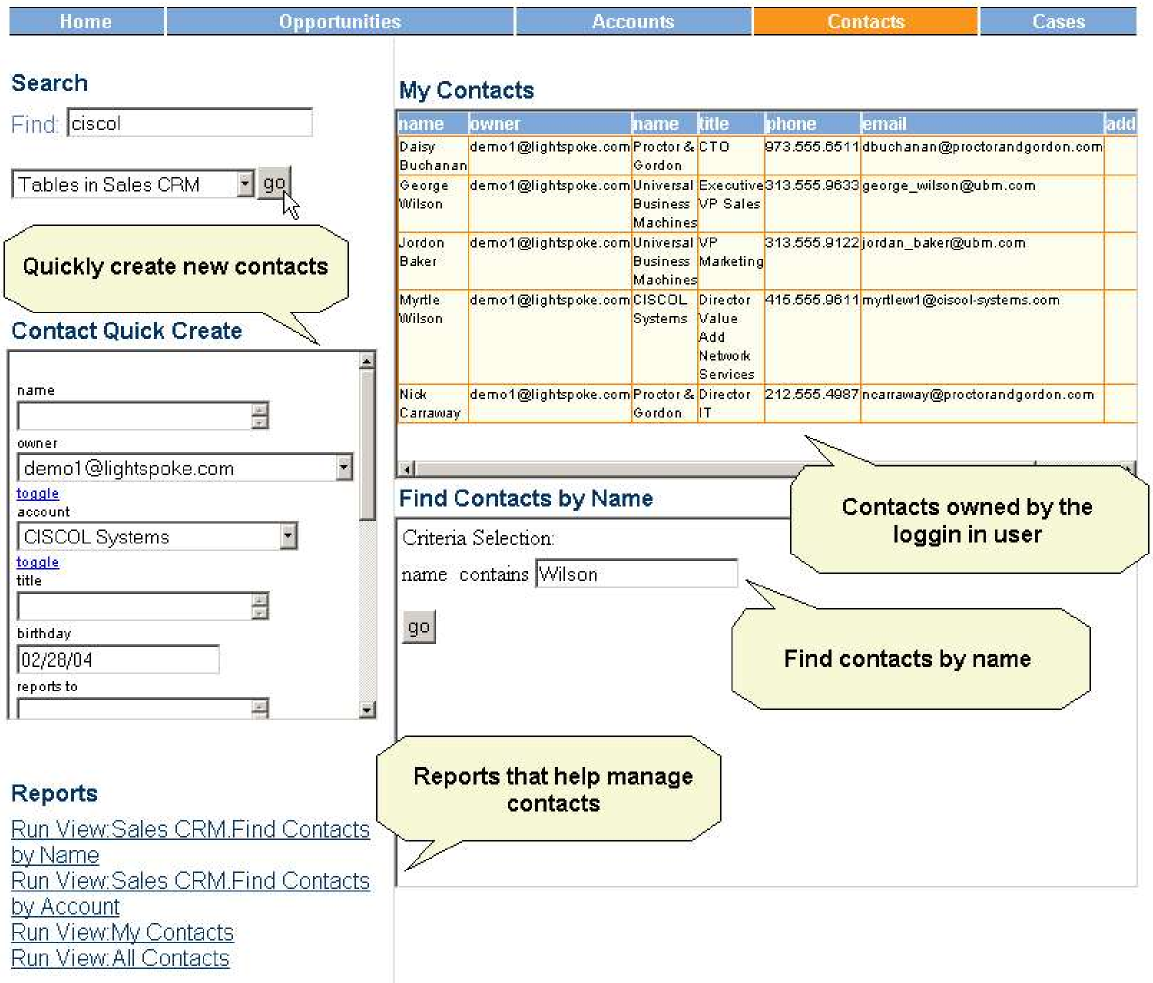
Account Management

Manage your accounts by using the *Active* Accounts view to identify accounts that need attention. The *My* Accounts panel shows the sales rep who is logged in active accounts that they are accountable for. Other reports include *Accounts sorted by Inactivity* help managers and sales people identify stagnating accounts.



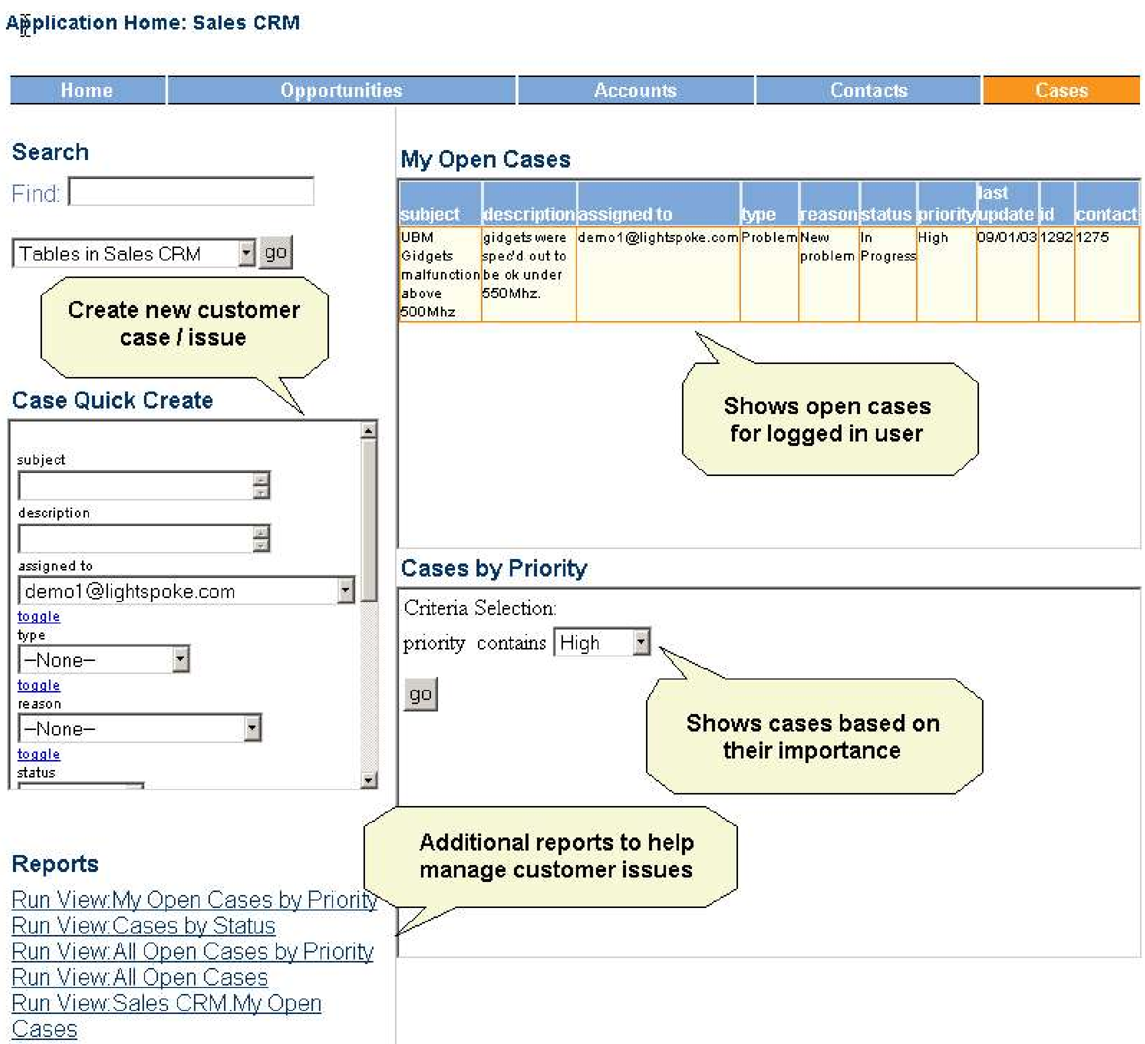
Contacts Management

Store and retrieve your contacts in the Contacts dashboard. The *My* Contacts views shows each individual sales person his or her contacts. Below, the *Find Contacts by Name* query helps your team find contacts. *Contact Quick Create* lets users quickly create new contacts.



Case Management

Successful issues handling of existing customers is a key component to CRM. The *Cases* dashboard helps sales reps or support specialists track customer issues. *My Open Cases* show the logged in user any cases they are responsible for. The *Cases by Priority* query lets your sales staff find the most important cases quickly. *Cases Quick Create* lets users quickly create new cases.

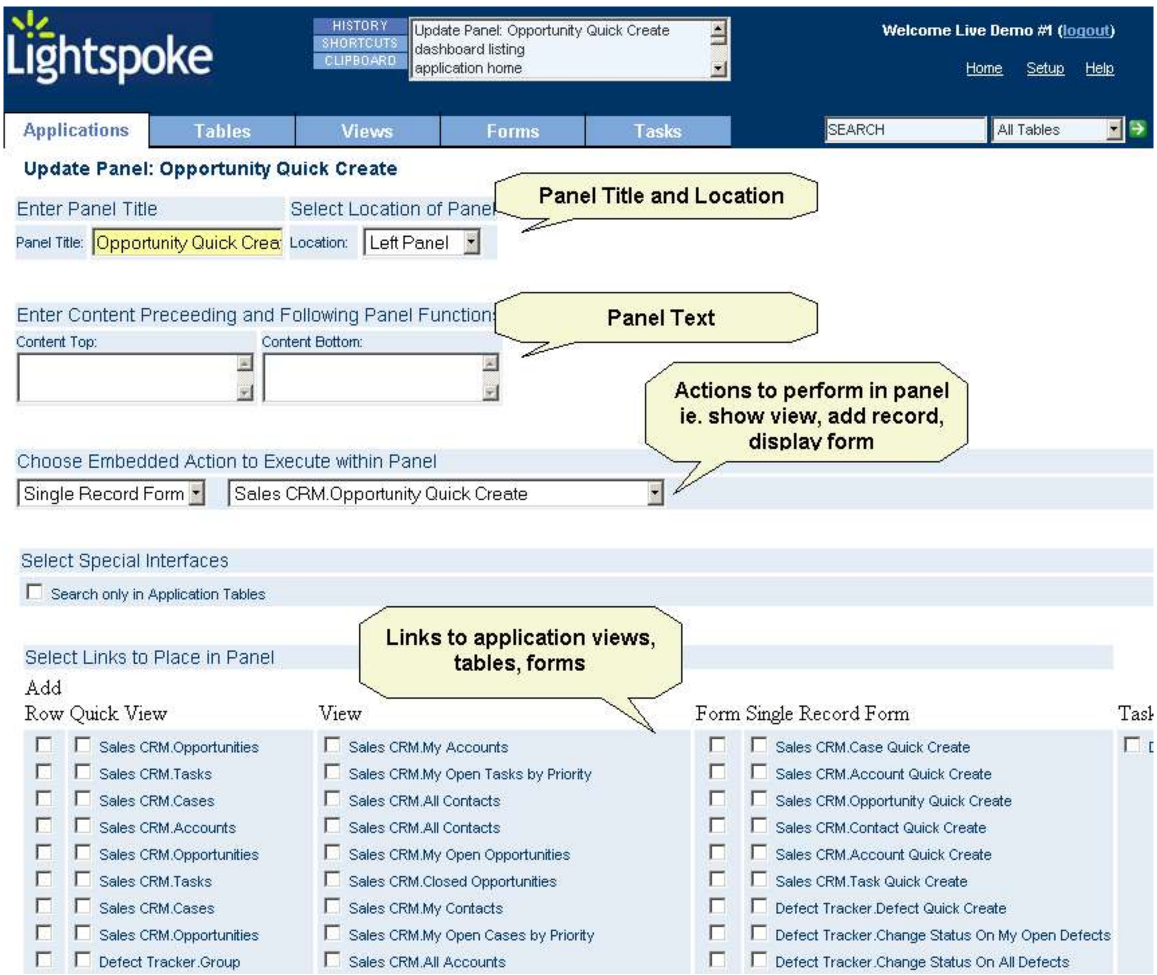


Extensible and Customizable

The above tour is the default layout of the Lightspoke Sales / CRM application. However, the application can be configured in any way you want. The dashboard can be completely reconfigured. Fields can be changed, added or removed from each of the Sales CRM tables. Views can be added or modified with a few simple clicks.

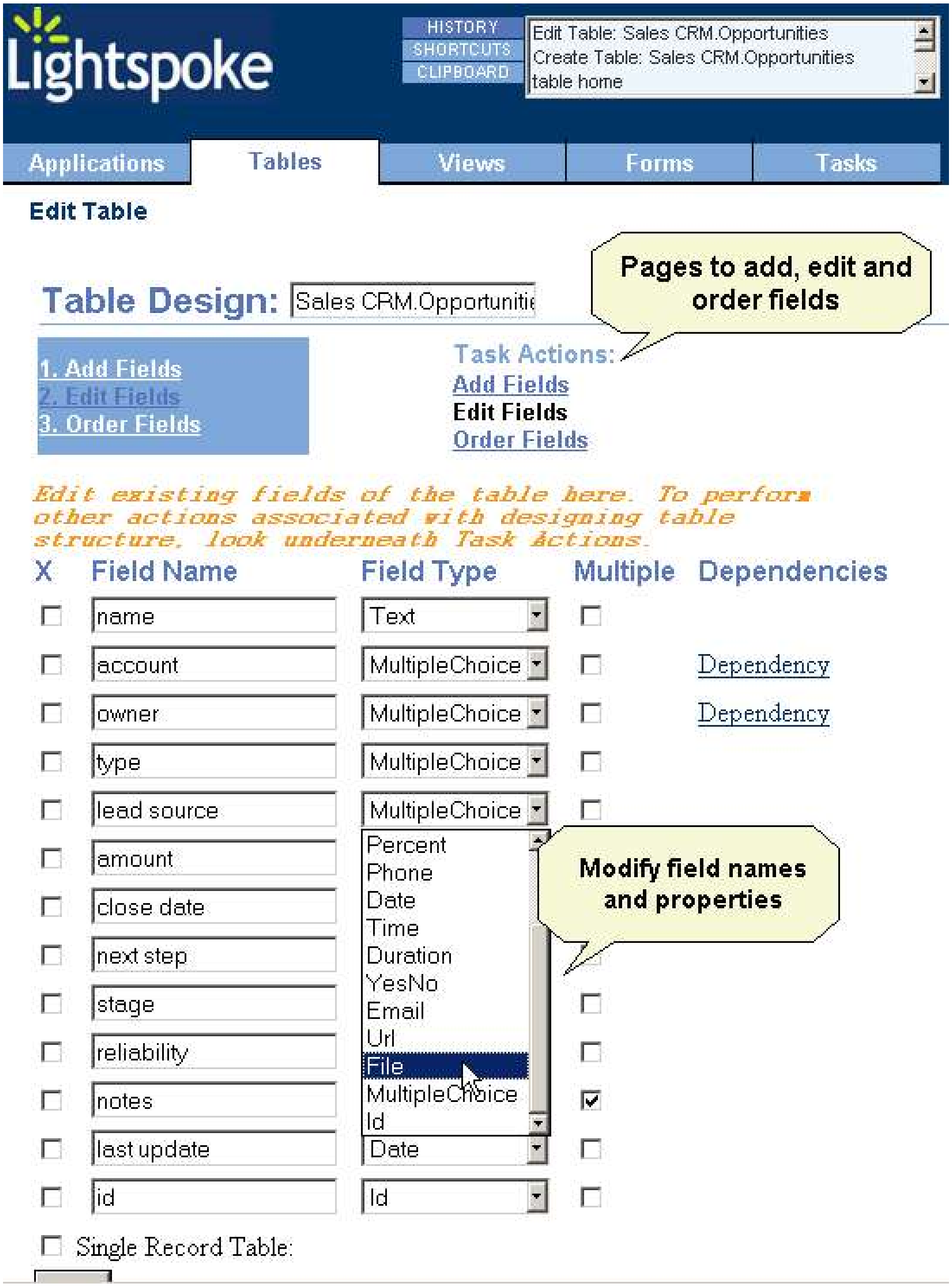
Customizing Dashboards

The following screen shot shows how easy it is to reconfigure the dashboards in Lightspoke.



Customizing Tables

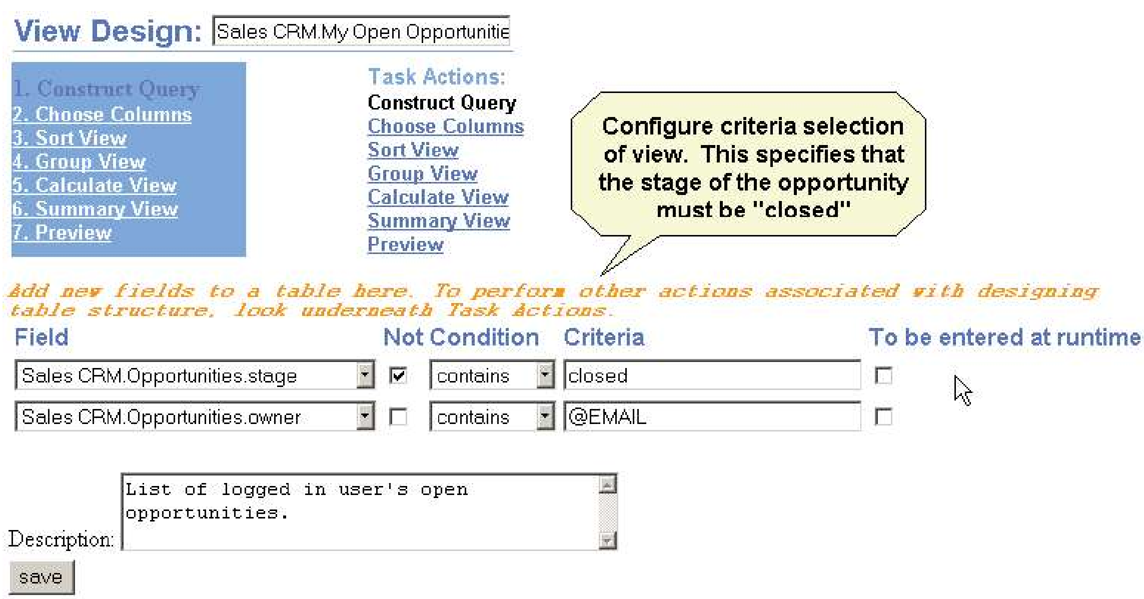
The following screen shot shows how easy it is to modify fields inside existing tables – or to simply create new tables.



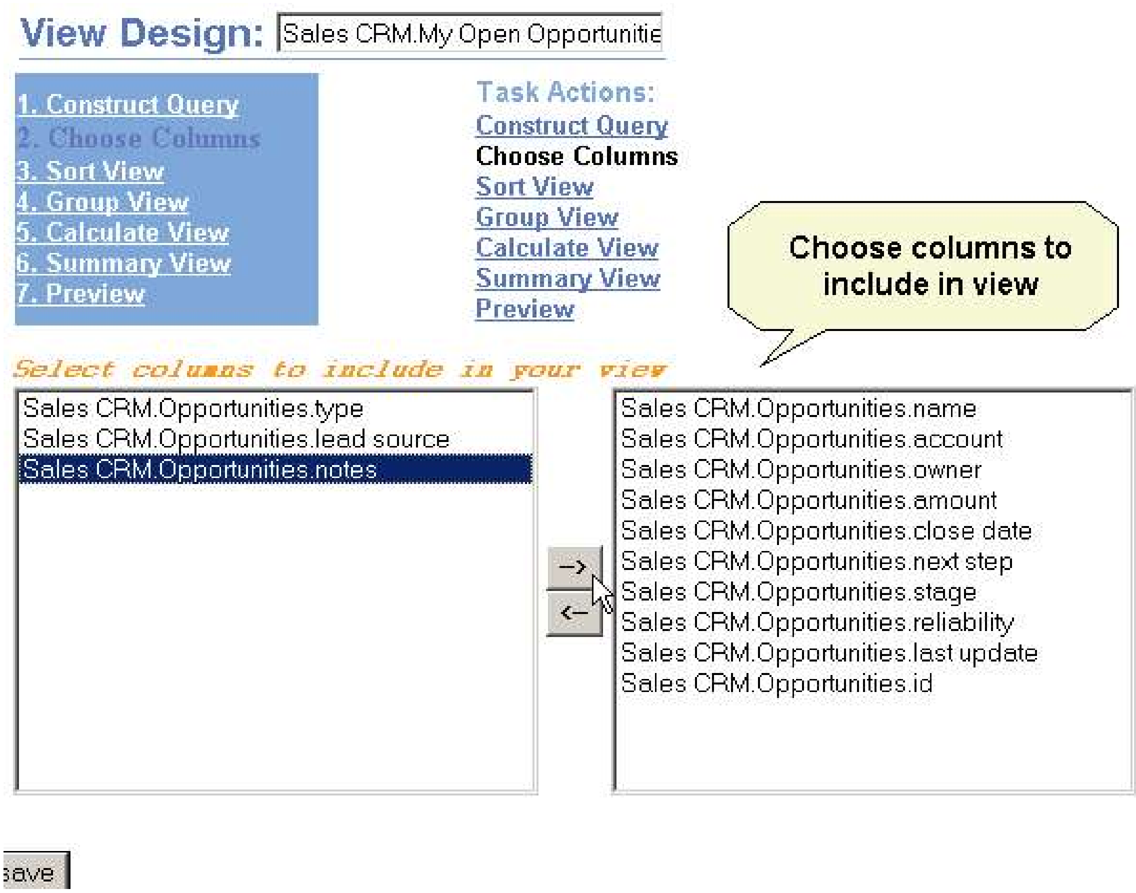
Customizing Views

The following screens shot shows how easy it is to modify views – or to simply create new views.

This screen shows the criteria page where business users can limit the records returned in a view. This particular screen shows a business user interested in knowing only opportunities that are NOT closed or open while at the same time, the opportunity must be owned by the person who is currently logged in.



The next screen shot shows how a business user can limit the columns shown in the view.



There are many more aspects to Lightspoke that is not illustrated in this solutions tour of the Sales CRM application. However, this tour should have demonstrated the benefits of the Lightspoke Sales CRM web application.

About Lightspoke

Lightspoke is an extremely powerful business tool that empowers the end users to take control of his or her application's functionality and behavior. Our vision is simple: "to become the world's most useful web application." And our mission is to provide unsurpassed utility to organizations seeking web-based business applications. We do this by developing a technology platform that delivers custom web applications on-the fly and empowers end users with the ability to shape their own applications.

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