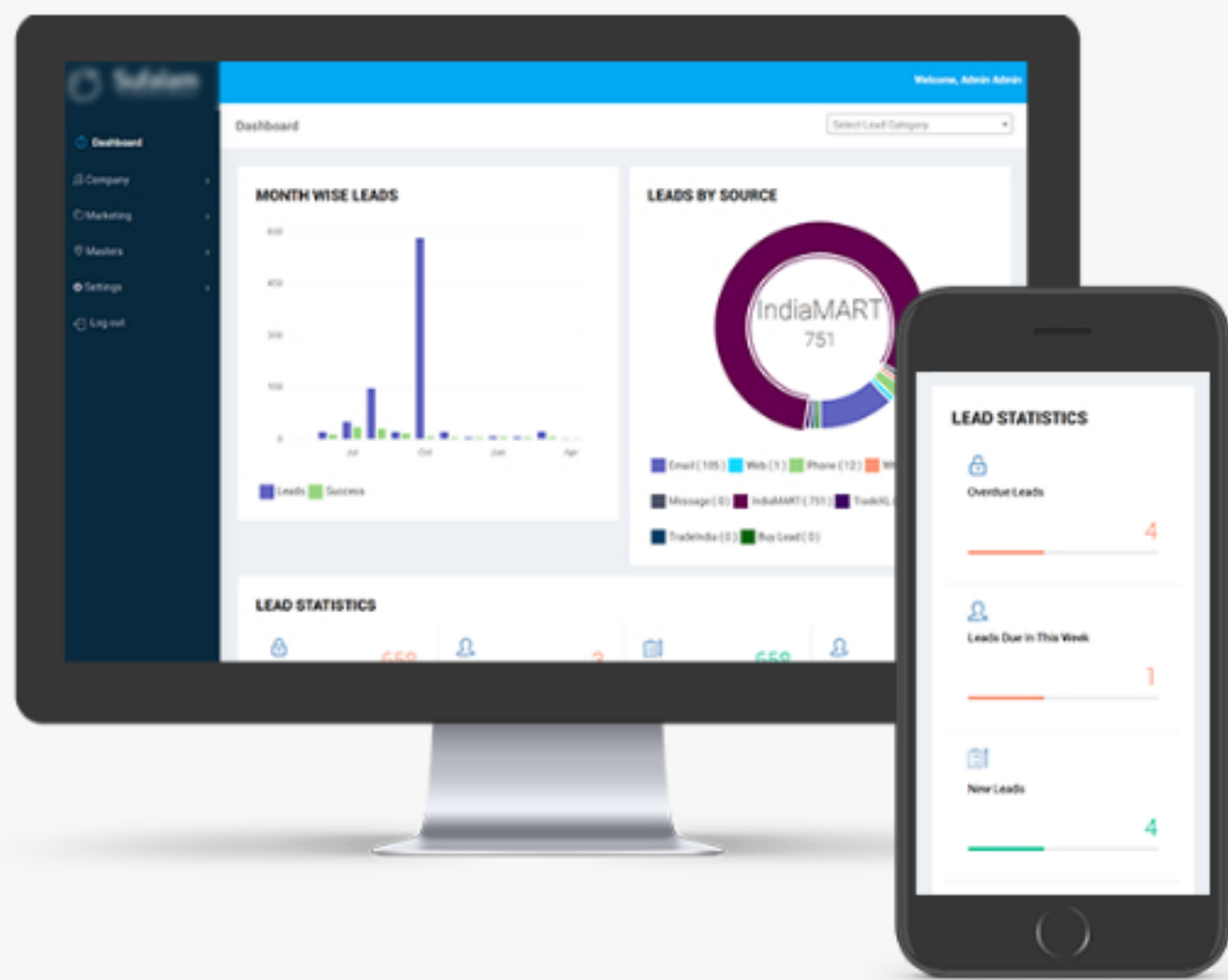


How A Leading Chemicals Supplier Streamlined its Lead Management Operations with a Robust CRM Solution?



About The Project

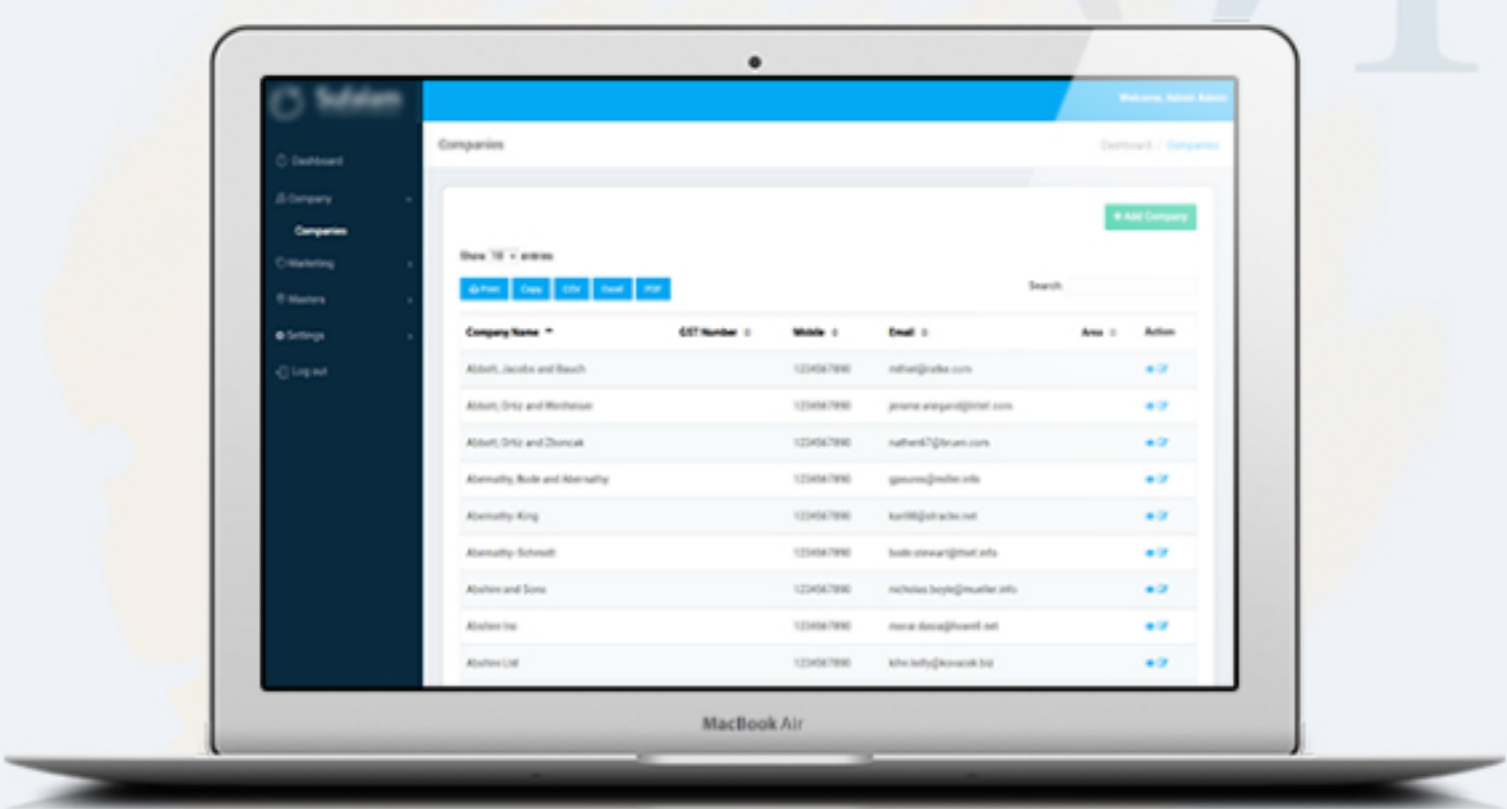
The client is a leading manufacturer, supplier and exporter of high-quality chemicals products. The company caters to the demand for high-quality chemicals in different regions across the state, country and the globe.

The client was finding it extremely hard to keep an eye on incoming leads from multiple channels and promotion activities. Lacking a central system, it was becoming challenging to distinguish between leads that were overdue and the leads which still weren't overdue.

Solution Offered

Team Sufalam understood the existing lead management process in the company and identified the need for turnkey digital transformation. A robust CRM system capable of handling the influx of leads was recommended, designed, developed and deployed to streamline lead management operations.

Sufalam developed an advanced CRM system integrated into a web application that addressed the concerns of two major stakeholders i.e. the top-level management and the lead management executives. The web application consisted of separate modules, namely Admin Panel & User Panel.



Admin panel company listing



Admin panel quotations listing

Objective

- ✓ To streamline lead management operations through a digital solution
- ✓ To analyze all incoming leads and categorize them based on overdue status

Key Features

- ✓ **Intuitive Dashboard:** The dashboard helped the management to track leads in a graphical format. The dashboard supported reporting of:
 - ✓ Leads on MoM-basis in the form of graphs
 - ✓ Leads by source
 - ✓ Lead statistics and action counters
 - ✓ Overdue leads
 - ✓ Recent leads
- ✓ **Add Company Information:** Admins can add, edit, view company details that are the main leads for the client
- ✓ **Lead Management:** Leads can be assigned to specific users. Admins can view leads, filter, add, edit or delete leads
- ✓ **Quotation Management:** Add, edit, view, delete or change the status of quotations
- ✓ **User Management:** Add, edit, view, delete or change user status.
- ✓ **Other Listings:** Add/edit/delete lead categories, status, actions. Also, the web app supports addition/editing or viewing of particular state, city or area.
- ✓ **Send Email:** Admin can directly send emails from the web application

Key Features of the User Panel

- ✓ **Informative Dashboard:** Check assigned leads, recent leads, overdue leads, get graphs for month-wise leads, monitor lead statistics & action counters,
- ✓ **Company Management:** View list of companies. Add, edit & view company details
- ✓ **Leads Management & Monitoring:** Check assigned leads, filter/add/edit/view or delete leads
- ✓ **Quotation Management:** Add/view/delete or change the status of quotation.



Admin panel how look in mobile



Overview of all screen

Solution Benefits

- ✓ Streamlined lead management with zero chance of failure to service leads in time
- ✓ Better control and coordination due to centralized lead management and CRM solution

Platforms Supported

- ✓ CMS: Web-based, opens on any browser

Tools Technologies Used

