

Modern Workplace

Sales Manager

CRM and Sales Management for Microsoft 365

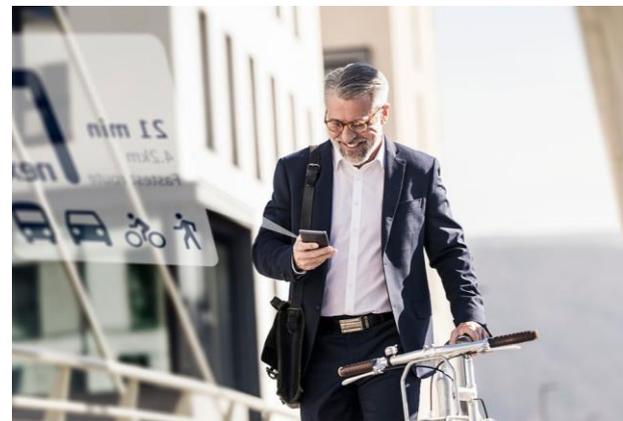
MW Sales Manager is a simple and easy-to-use CRM and sales management solution designed for small and medium sized businesses.

It brings your organisation's contact and sales management information into one place within Microsoft 365, enabling you to easily track and manage your leads, sales opportunities and contact activities. With MW Sales Manager you can easily record and qualify new leads, manage your opportunity pipeline, track all sales-related activities, and gain insights from dedicated interactive dashboards.

Work more efficiently and save time

MW Sales Manager gives you a single workspace where you can access and manage all your important sales and client information.

With everything in one place within Microsoft 365, you can keep on top of your opportunities and your sales process, wherever you are.



One solution, everything you need

- Manage your organisation's **contacts**, activities and follow up.
- Record and track **new leads**, and convert them into **opportunities**.
- Build and report on your **sales pipeline** and manage opportunities to closure.
- Gain instant insight into your whole sales lifecycle with **dashboards** of key metrics.
- Create **custom reports** for leads, opportunities, sales forecasts and revenue.
- Get up and running **quickly**, without the need for training.

✓ Work efficiently on sales in one place

✓ Streamline your entire sales process

✓ Proactively manage relationships

✓ Gain from sales insights and action alerts

✓ Boost productivity with M365 integration

✓ Leverage M365 to save time and money

Modern CRM and Sales Management for the Modern Workplace

MW Sales Manager can be accessed securely from your normal web browser or can be integrated with other Microsoft 365 services. It is designed to be **'Teams Ready'** and can be added easily to Microsoft Teams, so all its features and data are accessible to your sales team within the Teams experience.



MW Sales Manager uses Microsoft 365 technology to provide a modern user experience that is simple and easy to use. The service is available on any device from any location and users are automatically signed in securely with their normal Microsoft 365 credentials.

Contact Management

Store and manage all your company and **contact information** for leads, opportunities, clients, suppliers or any other type of organisation you deal with. Record **notes** for conversations, updates and other contact events, and **schedule** future contact activity to manage your follow up.

Opportunity Management

Support for the whole sales lifecycle. Record **new leads** and manage the qualification process to convert them into **sales opportunities**. Manage your opportunities through to closure, capturing all your sales updates and activities. Focus on your **pipeline management** using a dedicated opportunity funnel view.

'My Sales' Management

A **single dashboard** for each individual user where they can access and manage their own leads, opportunities and sales activities. Includes **alerts** on open, scheduled and overdue events, with drill-down into details so you can take action. Access is controlled by the user's Microsoft 365 credentials.

Sales Dashboards

Get the information you need with real-time sales **dashboards**, across the whole organisation or for your own opportunities and activities. Instantly drill into detailed information from key pipeline and forecast metrics. Keep on top of important tasks with **dashboard alerts** on upcoming or overdue events.



Feature Highlights

- **Contact management** with full organisation and contact data
- **Organisation** and **contact** views with sales and activity information
- Contact note and **activity tracking** and **scheduling**
- Sales **opportunity management** with configurable sales stages
- **'My Sales'** dashboard for individual lead and sales management
- Company **sales dashboard** with key metrics and drill-down
- **Lead management** view for recording and qualifying leads
- Live **opportunity funnel** report with drill-down
- Custom sales and forecast **reporting** with one-click export to Excel

Extend your CRM capabilities

MW Sales Manager is designed to work with the MW Contact Manager app, so you have a single **golden source** of contact information that is used across the organisation.

Contact us now to book a demo or to find out more about MW Sales Manager