

The image features a professional setting in a warehouse or office. A man in a light blue shirt and blue tie is seated at a desk, looking at a computer monitor. A woman in a light blue shirt stands behind him, smiling and looking at the screen. The background shows shelves filled with boxes and papers. The Salespad logo is overlaid on the left side of the image.

SALESPAD™

[SALESPAD.NET](https://www.salespad.net)

WHO WE ARE

Founded in 2003

Over 115 employees

Located in Grand Rapids, MI

15,000+ users

1,200+ companies



Who am I?

Ken Gauld, *Sales Engineer*

Over a year with SalesPad, April 2017

10 years of ERP system experience with a few multinational manufacturing/distribution companies based in Michigan (Amway, Wolverine Worldwide)

AGENDA

- What is CRM and MA?
- Where do each fall in the funnel?
- Who uses CRM and why is it needed?
- Success Stories
- Demo of SalesPad Desktop CRM
- Q/A

Quiz

What does CRM Stand for?
What is the difference between CRM and MA?



Customer Relationship Management

CRM tools make the customer-facing functions of business easier.

They help you:

- Centralize customer information
- Automate marketing interactions
- Provide business intelligence
- Facilitate communications
- Track sales opportunities
- Analyze data
- Enable responsive customer service

Marketing Automation

Everybody uses it, but few actually use it correctly. Marketing automation should be used by any company to grow and nurture their client base. They must understand that they are creating a customer lifecycle and not a one-time sale.

- Social Media Marketing
- Email Marketing
- Lead Generation
- Scoring Leads
- Lead Nurturing
- Metrics and Analytics
- Management and Workflow Activities

“To nurture prospects with highly personalized, useful content that helps convert prospects to customers and turn customers into delighted customers.”— Hubspot



Visual of the Systems

CRM:

- Contact management/ interaction tracking
- Lead management
- Deals and tasks
- Campaign management
- Email tracking
- Social media management
- Analytics
- Mobile access



Marketing Automation:

- Development and analysis of marketing campaigns and customers.
- Management of marketing campaigns.
- Appropriate customer data organization and storage.
- Moving contacts from leads to customers.

Who uses CRM and Why is it Needed?

Sales

Checking order status and order history. When communications that have been sent out and who the main contacts are for the account.

Customer Service

Checking on the status of an order, order history, and placing an order.

Marketing

Checking Account information for who to target for specific emails for reorders, and market segmentation.

Support or Field Service

Placing orders on the fly, looking up accounts, appointment scheduling, reporting, vehicle tracking.

Manager

Analysing metrics.

Where SalesPad Falls in the Funnel

- Record Keeping
- Customer Payments (Wallets)
- Custom Pricing
- Sales History
- Customer Interactions
- Audit Trails
- Prospecting
- Opportunity Management

Our Lens of CRM

What is included in SalesPad? What do we solve?

SalesPad's market differentiation is not having to juggle between screens when looking up a customer and the ability to customize the data that is displayed. Within this window you can view trailed audits, sales history, interaction history and place orders.

We use our Monitor concept to give you visibility to the pipeline of opportunities so that you can nurture them into orders.

Key Features of CRM Market

Industry Features

- Deals and opportunities
- Visible funnel
- Transactional level
- Transactional driven
- Customer visibility
- Line item visibility
- Adapts to industry
- Central repository of customer intelligence

What SalesPad does well:

- Providing detail down to the transaction.
- Gathering and viewing customer information.
- Viewing line item transactions.
- Nurturing Opportunities into Orders.
- Tailorable selling processes- Custom Dev
- SalesPad is not the marketing automation tool but we do have CRM capabilities integrated into our core product.

Success Stories

Detroit Radiator Co.

Truck Parts Retailer

SalesPad's tab structure allows CSRs to answer multiple calls at once and place orders for all of those customers simultaneously. "They can look up the cross reference to a part number, create a new customer in the system, and process an order in 90 seconds." — David Bitel, General Manager

Ohio Power Tool

Retail, Repair, and Distribution

For repeat buyers, the Customer Wallet feature saves customers' previously-used payment information for fast processing, along with quick access to customer's sales history allowing for fast repurchasing.

Demo

Enough with the talking...Let's see an example.