CRM | CUSTOMER RELATIONSHIP MANAGEMENT

Presented By

Ascentya
Research • Development

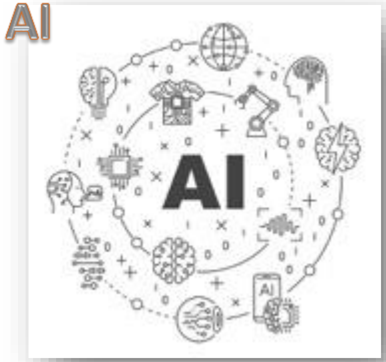
Mission: Transform R&D | Best Practices | Pioneer in R&D Solutions | Industrial growths

ASCENTYA plays an active role in capturing and spreading best practices of its members by using specific methodologies i.e. knowledge management, benchmarking, etc.

Building Initiatives to Address Cross-Industrial Big Challenges

We don’t just change industries. We help invent new ones.

AI

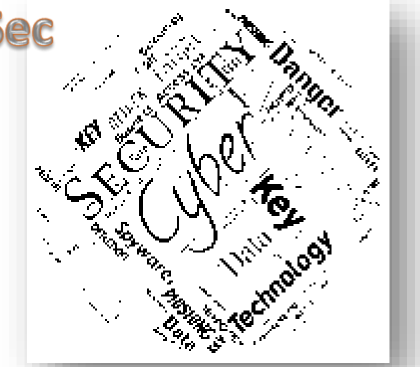


VR

Robotics

BI

Info Sec



an energetic contemporary approach post the economic downturn

Scalable Business Model

- ASCENTYA business model is based in part on its strategy of acquiring, integrating, and growing niche IT companies with valuable customers, complementary and proprietary products, and dedicated promoters.

Experienced Promoters and Management Team

- The company’s founders each have over 20+ years of experience, and are supported by executives with strong experience across all aspects of the business.

India Advantage

- India-centric back offices with experts to support the onshore teams whilst leveraging a lower cost base
- Addressing the rapidly growing IT requirements in India’s domestic industry

Proven in-house Product Development Capacity

- In addition to offering services related to licensed 3rd party products, ASCENTYA offers Innovative proprietary solutions.

On-device AI can help everyone leap forward.

ASCENTYA is on a mission to make devices, machines and, well, pretty much everything, more intelligent. We created Artificial Intelligence (AI) Platform designed to learn and adapt to your behavior and environment. So get ready for smartphones, cars and even everyday household items, to deliver intuitive, highly personalized user experiences.

Introducing devices that simply get you.

The next generation of devices will boast enhanced privacy, improved reliability, low latency, efficient use of bandwidth and dynamic computing capabilities. These improvements will accommodate all sorts of AI features and applications. So as handy as smartphones are right now, the integration of AI into these devices will have the potential to transform them from passive tools to engaging partners, helping us make decisions —or even making decisions for us.

C2RM Marketing

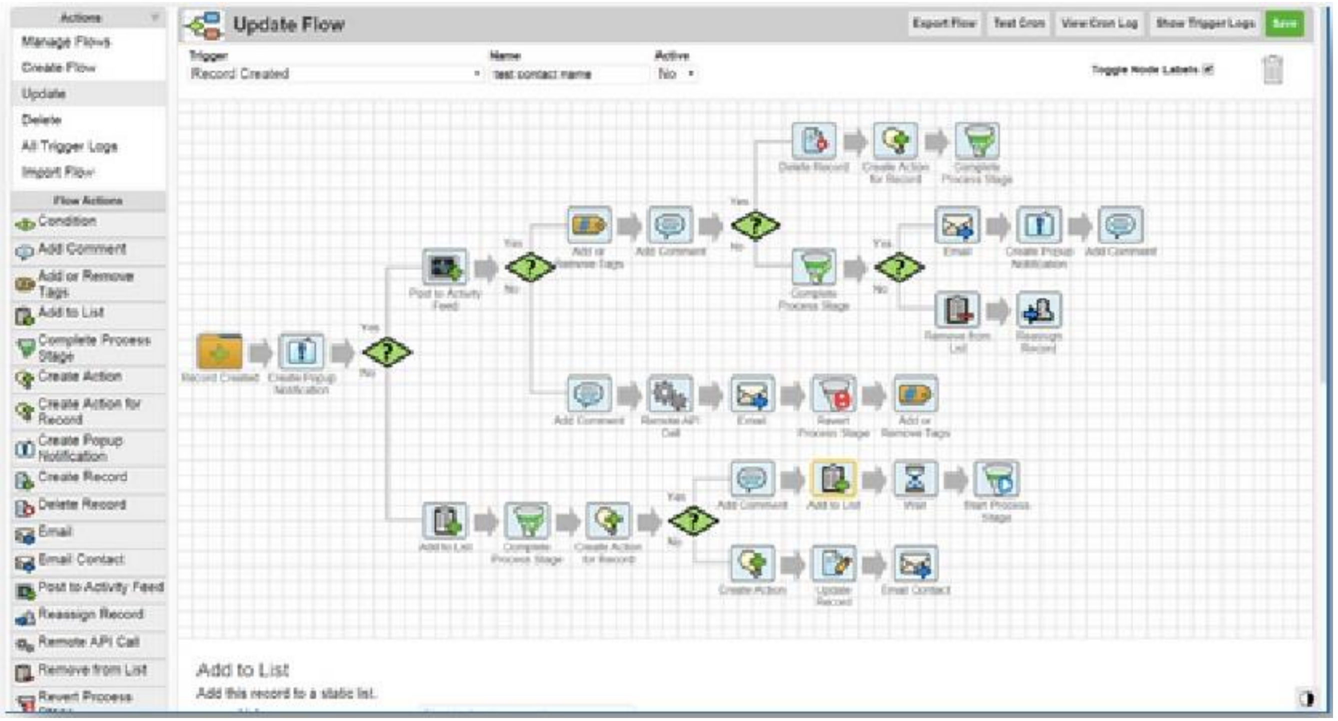
Effective marketing ensures quality leads are consistently entering the sales pipeline.

Unfortunately, many sales systems include only the most basic marketing capabilities and companies must purchase and integrate a separate marketing application which, more often than not, is expensive and unnecessarily complex.

C2RM is different: we consider marketing to be an essential component of a sales system and purposefully designed with integrated, highly useable marketing capabilities which can be effectively implemented and utilized by anyone in your organization.

MARKETING WORKFLOW

- Automating tasks increases employee productivity and allows you to extend the reach of your organization without hiring and training new employees.
- C2RM marketing automation, is an intuitive workflow designer and engine where you can leverage all the data in to simple yet sophisticated flows incorporating a variety of actions and conditions.
- Drop down menus and drag & drop capabilities are used to establish 'triggers,' along with associated conditions which must be met before any flow is executed.



ACTIVITY TRACKING

Website Activity Tracking

Tracking the behavior of visitors to your website helps you better understand who they are and what their needs are so you can directly address those needs and secure them as long-term customers.

For example, you can set alerts using our automation to notify you whenever a high-priority contact is on your plans and pricing page. With C2RM you can track web site visitors by simply copying and pasting a code snippet onto your site and then configuring tracking settings.

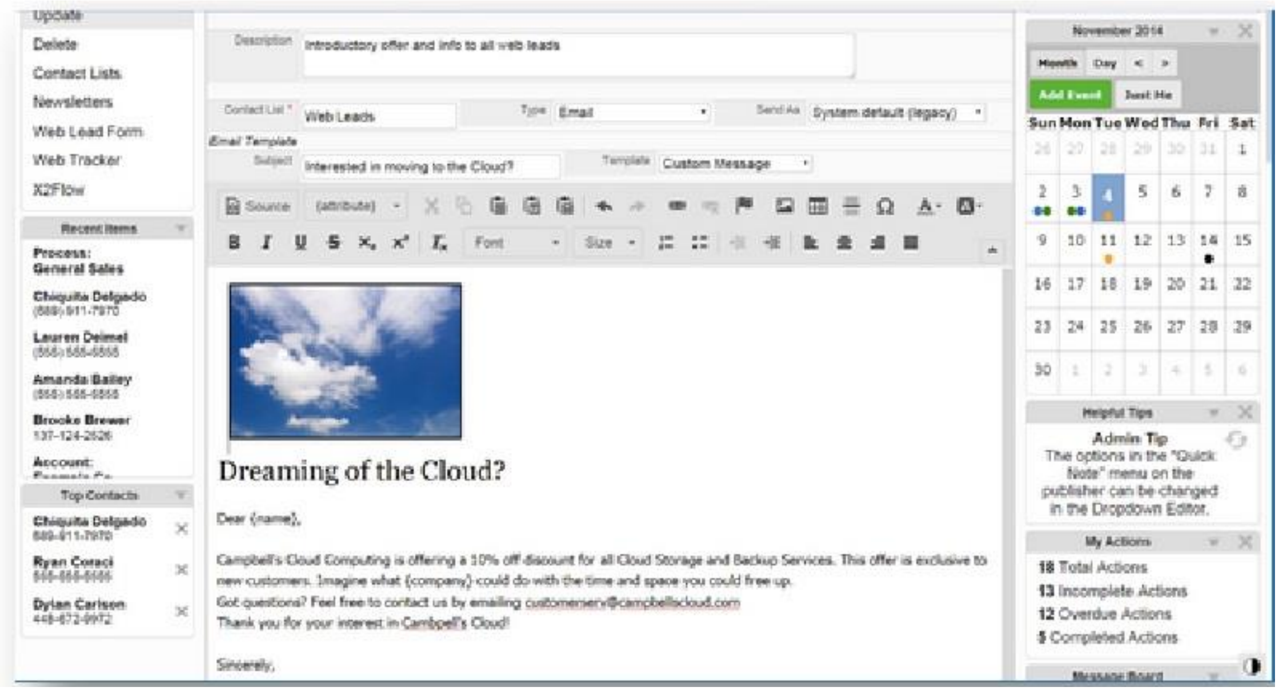
Contact Lead Routing

Even small and medium-sized businesses need full control over lead distribution to ensure each potential customer is managed by the individual most likely to move them through the sales funnel.

At the same time it needs to be easy for the appropriate individual to modify or add new lead routing rules as needed.

You can also create more sophisticated lead distribution rules.

TARGETED EMAIL CAMPAIGN



C2RM gives you the ability to create and send targeted and compelling email campaigns designed to resonate with prospects and customers.

Anyone in your organization to focus on the creative aspects of an email campaign, so they can give their attention to appealing to a particular group of prospects rather than underlying campaign logistics.

Users can easily create a collection of targeted campaigns for contacts grouped by different Tags or Contact Lists and successful campaigns can then be re-used as templates for future campaigns.

C2RM LEAD GENERATION

Tagging

With C2RM Tags you can easily group and categorize records in any way you like, so you can effectively communicate or target email campaigns to specific contact segments.

For example, you might want to tag leads from a recent #tradeshow so you can easily follow up with them, or tag customers who open a #supportCase so you can provide them with the best possible service.

Simply drag and drop a Tag from the Tag Cloud widget onto the contact's record, or easily create a new tag instantly by double clicking inside the tag field.

Newsletters

Newsletters are an ideal method for building an ongoing relationship with prospects and customers and keeping them informed of news and developments that may be of interest to them.

C2RM gives companies the ability to easily create and distribute richcontent newsletters. You can also track newsletter recipients email open behavior and pursue them accordingly.

C2RM also allows for the creation of customizable email subscription forms to fit within your site's theme.

WEB LEAD CAPTURE

With C2RM you can easily capture web leads through different web forms on your web site.

Easy-to-use drop-down menus and drag and drop field selection abilities allow you to create web lead forms which capture exactly the information you want from leads.

You can also embed your own Cascading Styles Sheet (CSS) formatting to ensure the lead forms maintain the look and feel of your web site.

Then you simply copy and paste the provided code snippet onto your website.

C2RM SALES

C2RM is a robust, highly-usable sale application which enables small and medium-sized organizations to efficiently sell to and manage their customers.

With a full Customer Relationship Management database, you can track and follow your interactions with contacts all the way from prospect to customer and beyond.

The flexibility of the C2RM system means it can be adapted to any industry vertical.

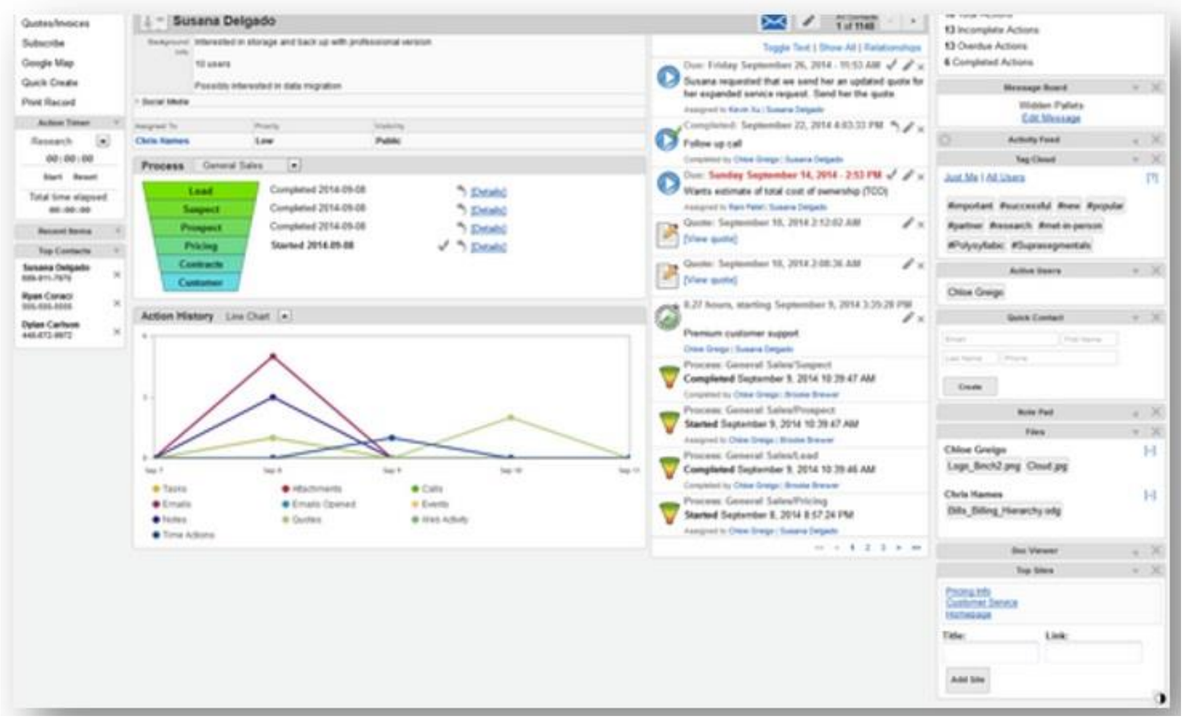
Your customized instance will seamlessly scale up with you as your business grows.

CUSTOMER RELATIONSHIP MANAGEMENT

The C2RM Contact interface is highly optimized because contact relationships are the core of any business. Though there is a great deal of information you can specify for each contact, it is organized so as to not be overwhelming.

Each client's record includes details on contact info, social media, associated processes, relationships, a complete interaction history for the contact, and more. View logged calls & emails, schedule a calendar event, or assign an action related to the contact.

Maintain a list of your key contacts and stay on top of the pulse of the sales flow.



OPPORTUNITY MANAGEMENT

Deal Opportunity Tracking Like Contacts, Opportunities are presented in an individually customizable interface which includes information about the potential deal, including sales process stage, probability of close, quoted price, associated contact or account, and more.

In addition, view the complete interaction history with the opportunity and related records. Add tags to the record to filter on. Create multiple deal opportunities with a single contact/account for repeated business.

Record Relationships

We recognize that every sales and service situation is unique and may have complex relationships with various people, companies, organizations, or otherwise.

C2RM gives you intelligent and flexible means to establish relationships between any type of entry to anything else.

For instance, you might want to link a specific opportunity with a contractor from an unrelated company who might have some influence in the buying decision.

SALES FUNNEL

Most organizations have some type of sales funnel where leads move from one stage to another as they become more qualified.

Since this process is often unique and may be different for distinct types of customers has a simplified interface for creating a process pipeline.

These process stages can be implemented in a number of dynamic ways, allowing users to identify segments of their contacts, accounts, and opportunities in various stages of interaction.

Setting up custom processes is a snap and can adapt to a truly limitless set of industries and use cases.

CORRESPONDENCES

Email Correspondence Manager

Email is an incredibly efficient way to communicate with people, and C2RM allows you to quickly and easily send rich text emails while recording these action so you and your colleagues can reference them later.

From any Contact record you simply select the email icon on the right hand side of the upper menu and a rich text editor automatically appears.

You can utilize templates or create your own message with any kind of formatting or attachments needed. Share inboxes between users – perfect for support, info, or newsletter accounts.

Quoting and Invoicing

Generating and sending sales quotes and invoices is often a necessary but timeconsuming process. C2RM simplifies the process so that in a matter of minutes any authorized individual can create and send professional-looking quotes and invoices for prospects and customers.

Existing templates can be selected to ensure all customer correspondences are consistent with your corporate branding.

Quotes and invoices can be viewed by others in your organization so everyone has a unified view of the customer's information. Add line items from your products module and make adjustments on the fly.

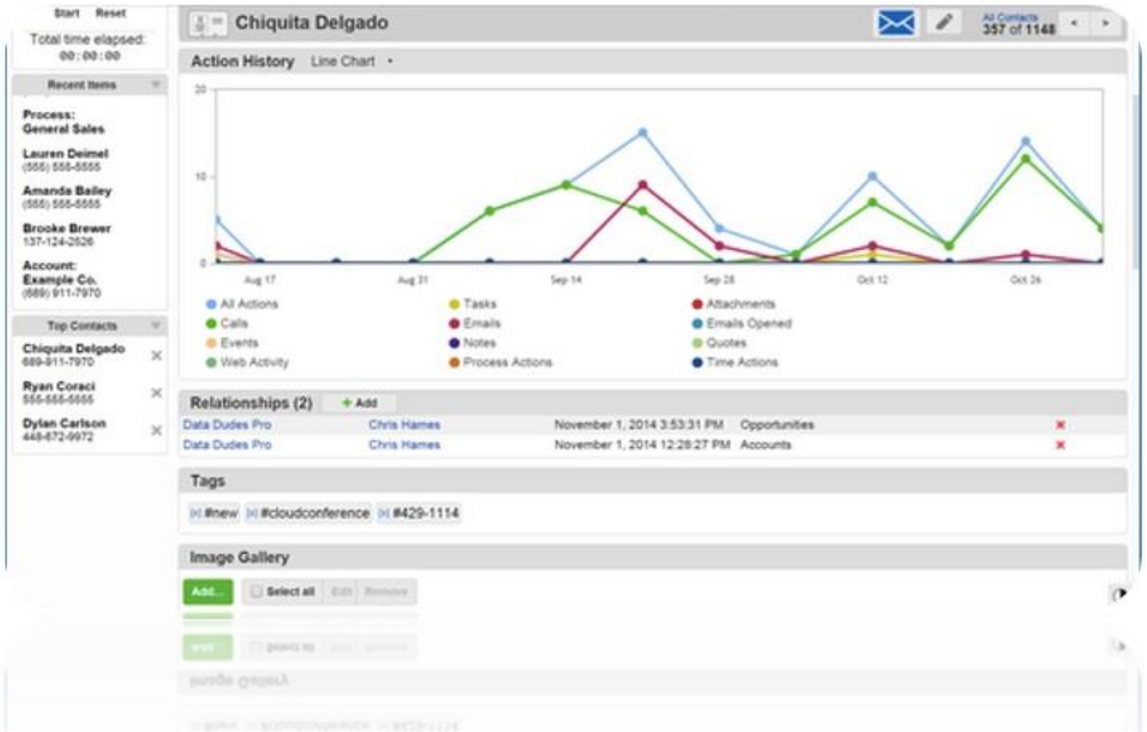
INTERACTIONS

Contact Interaction History Chart

This component offers a complete overview of all interactions with a contact at a glance.

You can view events like calls, emails, or web activity in a simple graphic interface that demonstrates the level of activity and interactions the customer has been involved in.

The charts are customizable, allowing you to edit and view which types of data you would like to see information on, as well as modifying its time frame.



C2RM PLATFORM

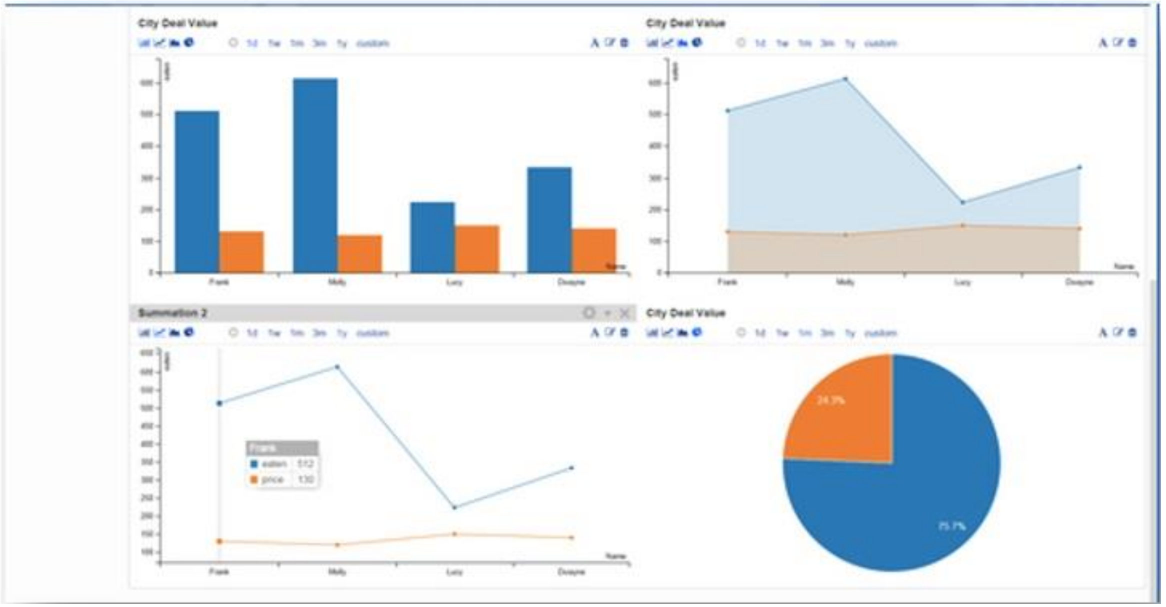
The administration panel offers users a wide array of managerial and supervisory abilities, tools, and utilities for regulating detailed aspect of the application, and by extension, your business.

This allows admins to maintain organizational standards and best practices, and to maximize productivity for all users.

In addition, administrators have the flexibility to customize and extend with the intuitive development tool.

C2RM platform tool set offers fine tuned control of its interface to satisfy your company's sales, marketing, and service needs.

REPORTING & ANALYTICS



C2RM reporting and analytics capabilities enable you to monitor and react to marketing, sales and service performance, and ultimately make "closed-loop" changes which improve performance.

With simple drop-down menus users can create a variety of different reports for campaign performance, lead performance, user activity, service cases, etc., or they can create and save custom reports.

The visual, easy-to-read charts allow users to easily examine data from different perspectives, and quickly spot trends, issues, and opportunities.

TASK MANAGEMENT

Activity Feed Stream

With the Activity Feed you can keep an eye on everything going on in your business. You have access to all posted events in an intuitive, social network-style feed, as well as the ability to filter the information by user, event type, or any other manner.

With the rich text editor you can send public or private messages attached with files and photos to individuals or groups. Set specific activity feed filters to and generate an automatic email digest of those targeted events to be sent directly to your inbox on a daily, weekly, or monthly basis.

Task Management

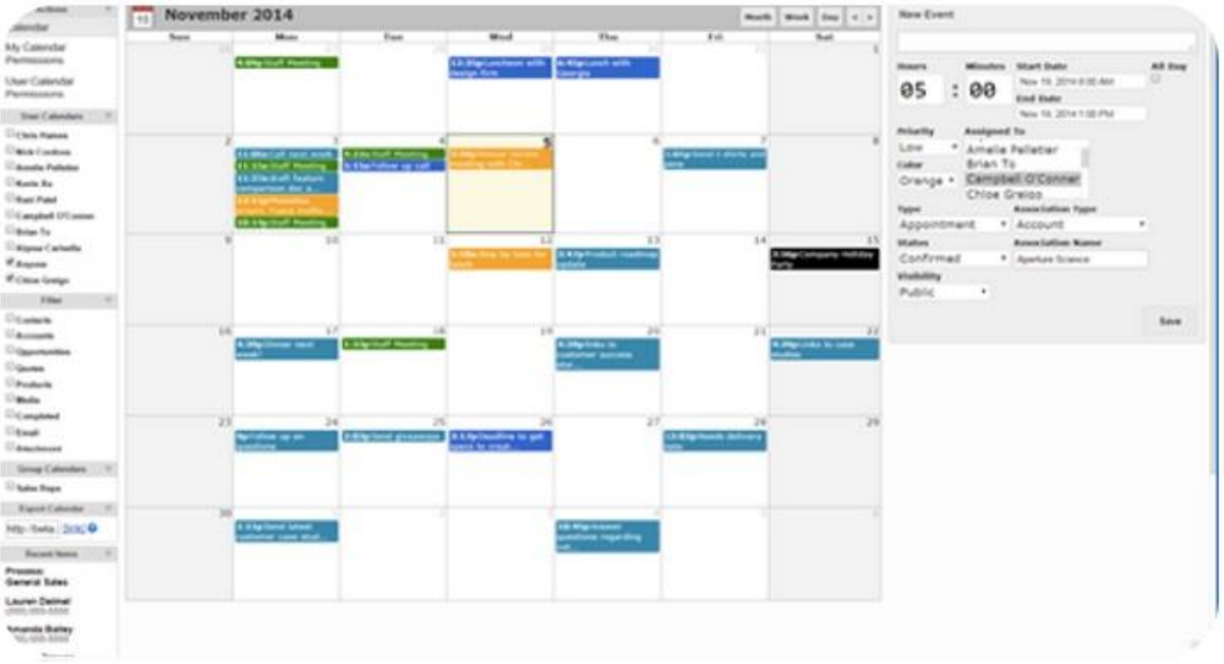
C2RM offers an efficient Task Management interface where users can create actions assigned to others as well as view and manage their own assigned actions.

Users can view a friendly to-do-line interface, or easily manage dozens of actions at once within the grid view.

Actions can be assigned to individual users or a whole group of users. You can also set alert notifications to remind the appropriate users of impending due dates and critical tasks.

Simple drop down menu filters allows users to see Actions of a certain type or for a specific time period.

TEAM CALENDAR



Having your entire organization centralized on C2RM flexible calendar module increases employee action visibility and productivity.

Users can easily schedule any type of event for individuals or groups, and set status, priority, reminders, and a myriad of other options.

Synchronize your C2RM calendar with your Google calendar via Google integration. Associate events with contacts, accounts, or any other record type.

Color code your events using the customizable color selector. Automate calendar event.

ACCESS ROLES - SECURITY

User Management and Access Roles

Administrators have complete control over their users' level of record access, permissions to edit or update data, and group memberships.

They can create new users and assign them to different group categories based on their involvement in the organization, such as a Sales or Customer Service Rep. Administrators can create access roles and control the users' ability to view and edit records, specified right down to the individual field level.

Each role has its own defined access to modules and sensitive record data.

C2RM advanced security tools give you even more control over data protection, allowing you to ban or whitelist IP addresses accessing your system.

Intelligence Augmentation

For further assistance please connect @

enquiry@ascentya.in | www.ascentya.in