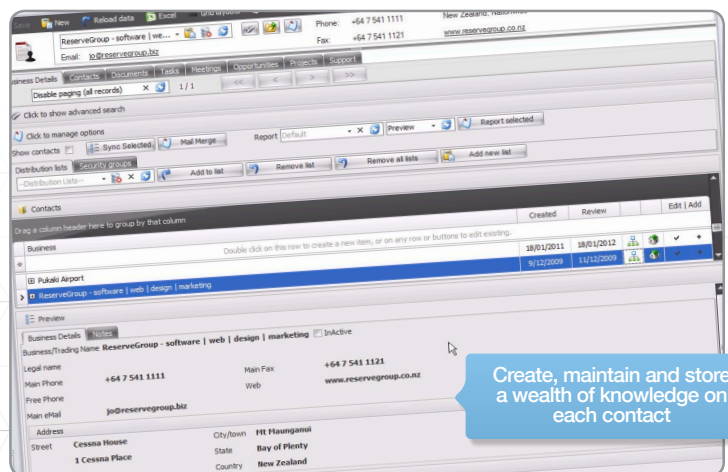# eVOsuite

Client Relationship Management system | CRM

Client relationship management (CRM) is a widely implemented strategy for managing interactions with customers and sales prospects. It involves using a system to organise, automate, and synchronise business processes—principally sales activities, marketing, customer service, and technical support.

evoSuite CRM is designed to help you find and attract new customers, nurture those customer relationships, and reduce the costs of marketing and client service.

Create, maintain and store a wealth of knowledge on each contact

	evoWeb	evoWin
Sales — Make it easy for your sales force to enter and track their leads and convert them into sales		
Store your leads in a database for future communications and convert them into real opportunities Have complete visibility and control of your sales pipeline and give your sales team better tools to record and track leads	X	✔
Add an opportunity within a specific client's file, assign it to a staff member and add important details like priority, status, start and due dates, notes and documents Ensure no opportunity is lost by centralising all information and tracking action points	X	✔
Manage customers, accounts View, manage and track all opportunities at any stage of the sales process	X	✔
Marketing — With a central dashboard to work from, it's never been easier or faster to engage your audience at every digital touch point		
Maintain customer data and distribution lists to send attractive, branded communications Stay in touch with your customers, nurture relationships and convert communications into sales	X	✔
Set up and maintain product information like brochures, catalogues and price lists and interface with the documents module to send them with your communications Build a product information database and send your leads and customers your latest offers and information easily and quickly	X	✔
Save time by publishing your communications easily in multiple places with the Announcements and eMarketing modules Send information to your website, mobile site, social media sites, newsletters, RSS feeds, eBrochures and more via the API. Your announcements and documents can go right where you need them to, saving you time and maintaining your presence on multiple channels easily and quickly	X	✔
Customer Service — Improve client relationships and your service by simplifying the service process		
Create, maintain and store a knowledge base from product knowledge to training material Build a valuable customer service information database and ensure quality communication with your customers	X	✔
Track support requests from your customers Improve efficiency and enhance customer service with a centralised support system, the ultimate electronic client filing system	X	✔
Maintain documentation Ensure your team always has the latest product information on hand	X	✔
General Features		
Create, track and synchronise with Microsoft Outlook many types of activities: phone calls, meetings, tasks, letters, faxes, emails, leads, opportunities, sales orders, support requests, and notes. Each activity can have further notes and documents attached and cross-referenced with each other	X	✔
Create sophisticated summary reports with the click of a button and manipulate live data with drag-and-drop tools or export to Microsoft Excel or Word for further insight	X	✔
Analyse your data using our powerful and flexible evoSuite grid to see which marketing campaigns have been the most popular and tailor your communications accordingly	X	✔
Click the built-in icons to go to a client's website, send emails or track activity – saving time by using the power of your evoSuite CRM to direct you where you want to go instantly	X	✔
Interface with other modules for an all-encompassing approach to your sales, marketing and customer initiatives, centralised from one intelligent system – your evoSuite CRM		