Abstract

An overwhelming amount of data is produced by an active sales team who store all this data in the form of handwritten notes, excel spreadsheets, text documents, or by memorizing it. The consequence of this is misplaced details, inconsistent follow up of meetings, and prioritising customers based on assumptions rather than facts.

Additionally, your customers may resolve their queries using different communication platforms, such as phone, email, and social media. Hence, if we don’t have a standard platform for interacting with customers, this information exchange can be easily lost in the tremendous amount of information generated, resulting in poor feedback to your customers.

It will be stressful to derive intelligence from the vast amounts of collected data. This leads to difficulty in constructing and generating reports, which ultimately reduces productivity. A Manager’s vision of what their teams are doing and where they stand begins to fade, resulting in
failure to offer the right support when needed.

Sales Performance Management System for Mutual Funds aims to gather information from a variety of sources across your business and gives you unprecedented insights into how your customers feel and what they are saying about your organization. Hence, you can improve what you offer, spot problems early and identify gaps, and, ultimately, keep your customers happy with better service.

References


Index Terms
Keywords

Customer Relationship Management, CRM