

# SmartOpportunities

Track and manage every opportunity to win new business

Revenue predictability is an elusive goal for nearly every sales leader and business line manager. Managers must have visibility into the pipeline of active sales opportunities, understand which activities have produced results in the past, look for ways in which to increase the health of the pipeline, and help the sales team diligently coordinate the activities that produce sales.

## Opportunity Tracking & Reporting that Adds Tangible Value

SmartOpportunities, available as an add-on module to SmartOffice®, provides the tools your organization needs to effectively manage your sales process. SmartOpportunities gives organizations of every size — from small practices to large firms — the ability to track and manage every sales opportunity, ensuring your team has the best shot at winning the business. Integrated with other SmartOffice modules such as SmartPolicies, SmartLeads, and SmartSeminars, the solution helps sales managers gain instant visibility into the status of current opportunities, and easily analyze win/loss ratios to take corrective action where it's needed most.

This simple yet powerful tool also gives sales managers the ability to create a tailored opportunity tracking and reporting methodology. As opportunities move from stage to stage, users and their managers can track progress online — from initial follow-up, to information gathering and needs analysis, to the presentation of your products and services, to the successful close of the sale. Flexible reporting tools make it possible to view real-time statistics on sales pipeline status, forecasting, and other critical business issues using the Opportunities Dashboard. And dynamic reporting capabilities help to quickly turn this data into meaningful management reports that drive tangible value.



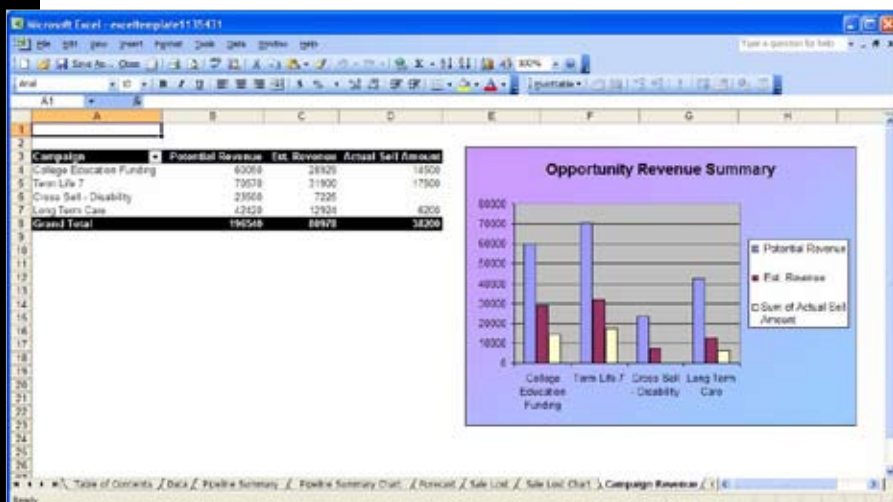
### DATASHEET

- Examine the health of your sales pipeline by individual, team, or organization
- Forecast expected sales
- Coordinate resources and sales activities
- Customize pipeline stages to fit multiple unique sales processes
- Specify best practices for completing each stage

# SmartOpportunities provides these valuable features:

- **Opportunities Dashboard** gives management instant visibility into each opportunity to determine the best course of action. Views include opportunity-specific activities and communication, where each opportunity falls within the sales pipeline, and how actuals compare to the sales forecast.
- **Dynamic Reporting Capabilities** make it easy to create detailed management reports in pivot tables or Microsoft®Excel® spreadsheets. Reports can detail any aspect of specified opportunities, including win/loss ratios, campaign success rates, and other relevant data.
- **Campaign Opportunity Report Summary** is viewed from the Opportunities Dashboard and allows users to analyze the amount of sales resulting from each marketing campaign or phase of a campaign.
- **SmartOffice Integration** provides instant access to important data in other SmartOffice modules, such as pending case status, campaign tracking, and leads management.
- **Handling Options** automatically process actions once a new opportunity record is associated with a specific marketing campaign.
- **Flexible Settings** allow a variety of customizations within the application. Multiple users may be assigned to a single opportunity, opportunity stages can be customized to handle different sales cycle stages, and

managers can define the opportunity type to handle different sales methods such as 'retail', 'wholesale', etc.



"One button" integration with Microsoft Excel® provides graphical analytic reports of sales pipeline and Opportunity status.

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