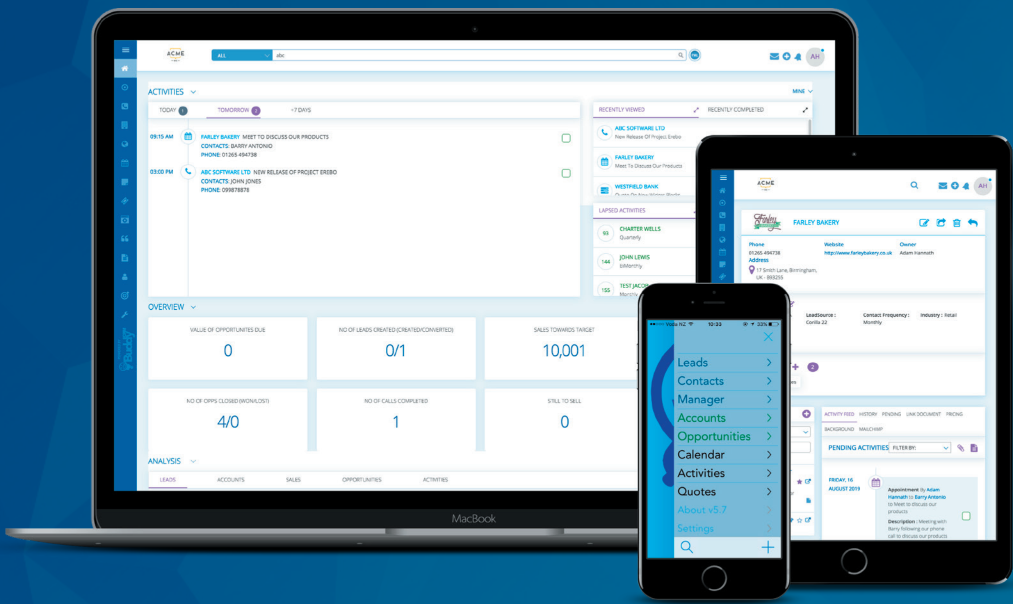
Grow your business

Buddy CRM

sales • support • marketing

The easy to use online CRM software for for sales, support, and marketing teams.

We like to think of BuddyCRM as the champion of sales teams throughout the UK and pride ourselves on the level of support we provide.



We know from first-hand experience that putting a customer relationship tool into your workplace can be a challenging experience. That's why we started BuddyCRM - as a response to the terrible interfaces and low levels of support in the CRM industry. **BuddyCRM was built by sales professionals for sales professionals.**

BUDDYCRM HAS:

- Contact and Account Management
- Opportunity Management with Sales Pipeline
- Single Customer View with emails (and attachments!)
- Targeted Email Marketing
- Reporting
- KPIs
- Calendar
- Quotes
- Integration with other systems

BUDDYCRM IS:

- Your sales assistant on the road, enabling you to update appointments and contact information as you go.
- Your connection with sales team members
- Your connection to your customers in your marketing efforts
- Your appointment setting tool

... it is a positive to be working with a UK local business. With their support team just down the road we knew we would be able to contact BuddyCRM if we needed. ”

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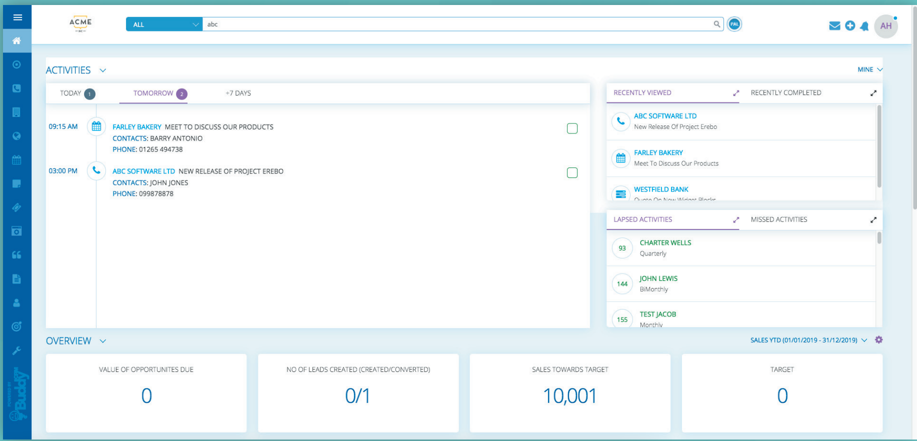
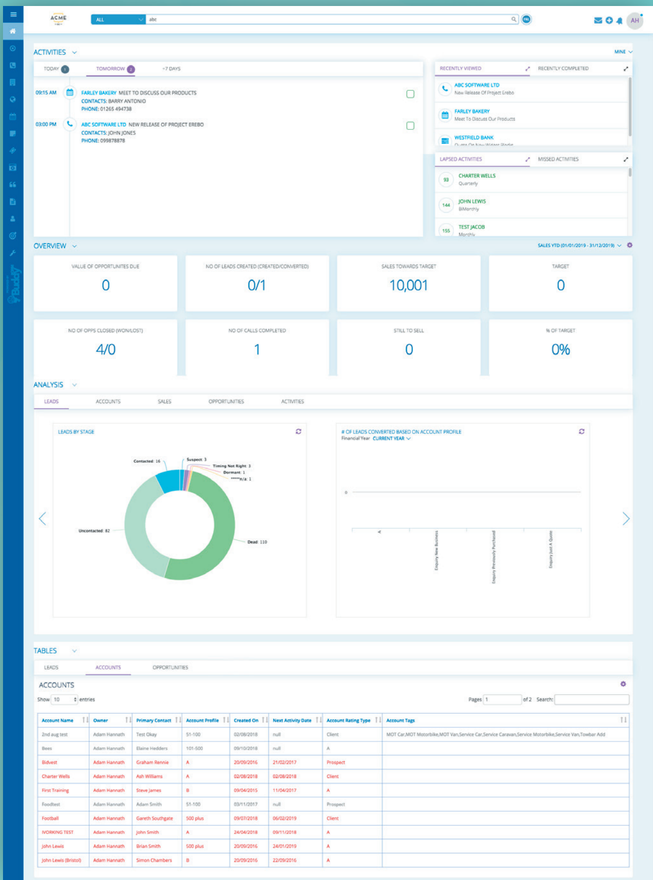
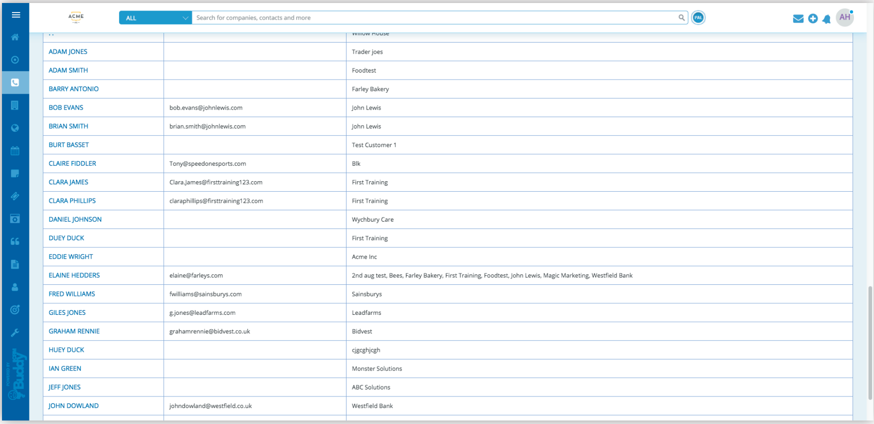




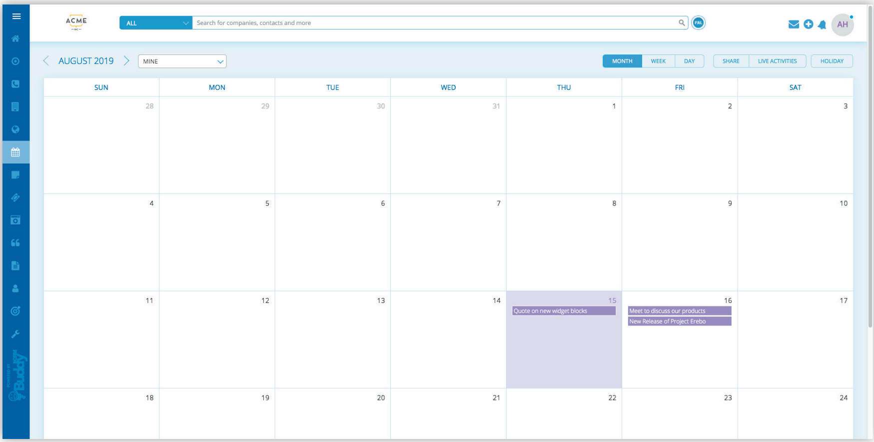
Dashboard

- Personalise the Buddy home screen dashboard with as much or as little information as you require.
- Check your diary quickly with Today, Tomorrow and 7 Day agendas.
- See your lapsed, missed and recently completed activities.
- Get a quick overview of your progress towards sales targets, see your opportunities and review your progress towards closing sales.
- Add charts, reports, and tables on your Leads, Accounts, Sales, Opportunities and Activities.



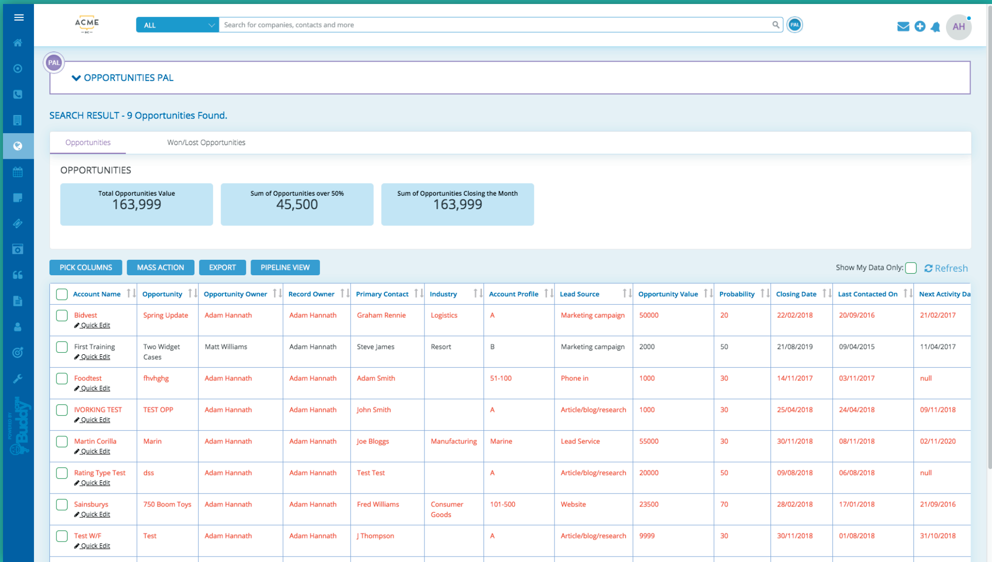
Contacts

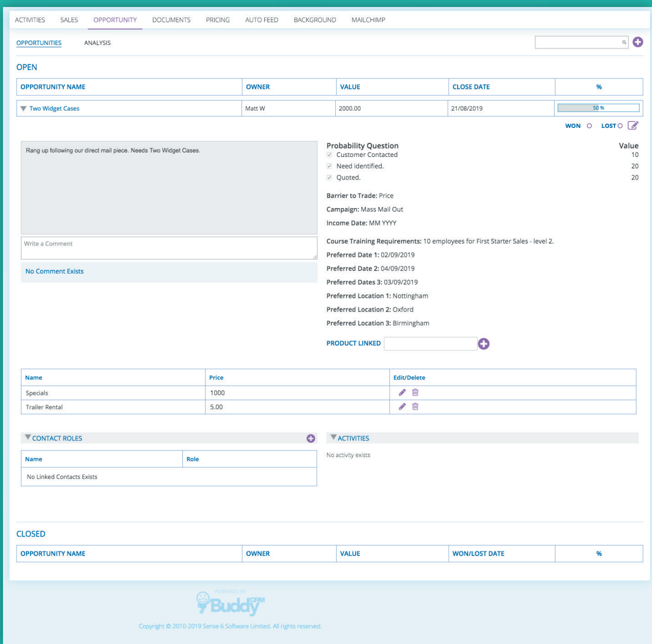
- Store notes, appointments, calls, tasks, emails and important documents relating to your clients and prospects in one place.
- Prepare for your sales call or appointment in advance with a single glance at your customer's record. Never be unprepared again.



Calendar

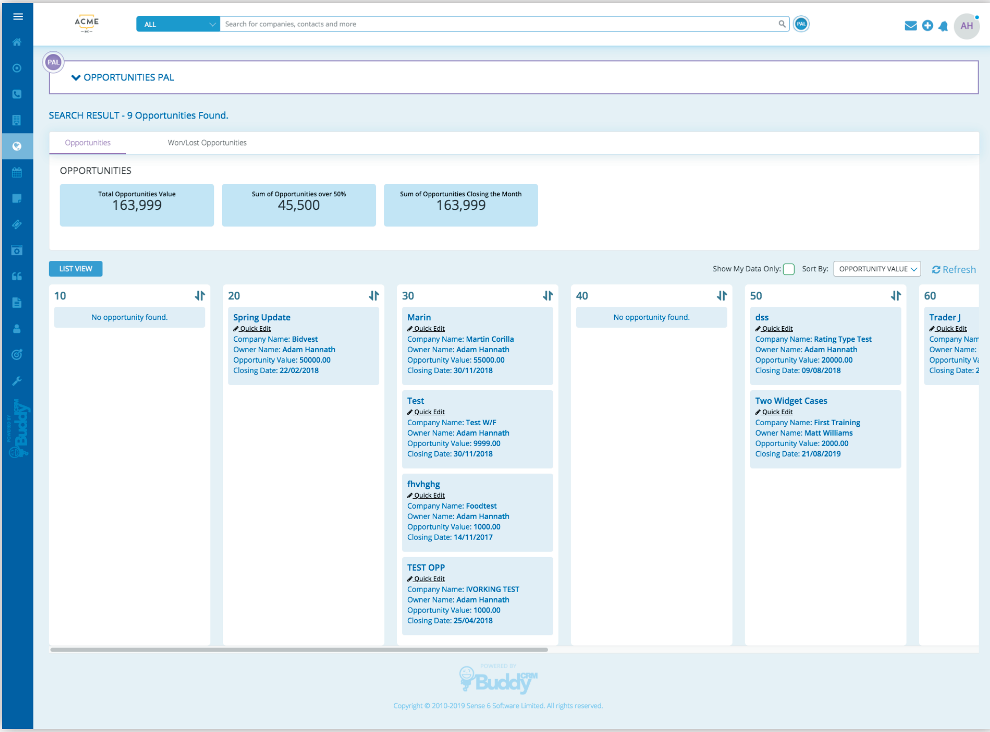
- Keep a company wide calendar with all activity shown including appointments, calls and tasks.
- Appointment setting teams can edit schedules from head office.
- Control who sees what by defining groups of sales teams in regions, areas, and by seniority level.





Opportunities

- Track potential sales with a customer, such as a bid, deal or proposal. Set the % value for each milestone to keep track of progress and gather reports on your business deals. Follow a deal's history and customise with your own custom fields.
- Use milestones such as contacted, meeting, proposal, won. Each milestone is linked with a success factor that is used to forecast potential sales revenue.
- Know each opportunity's expected value. Forecast your sales pipeline value based on probablity and total opportunity value.

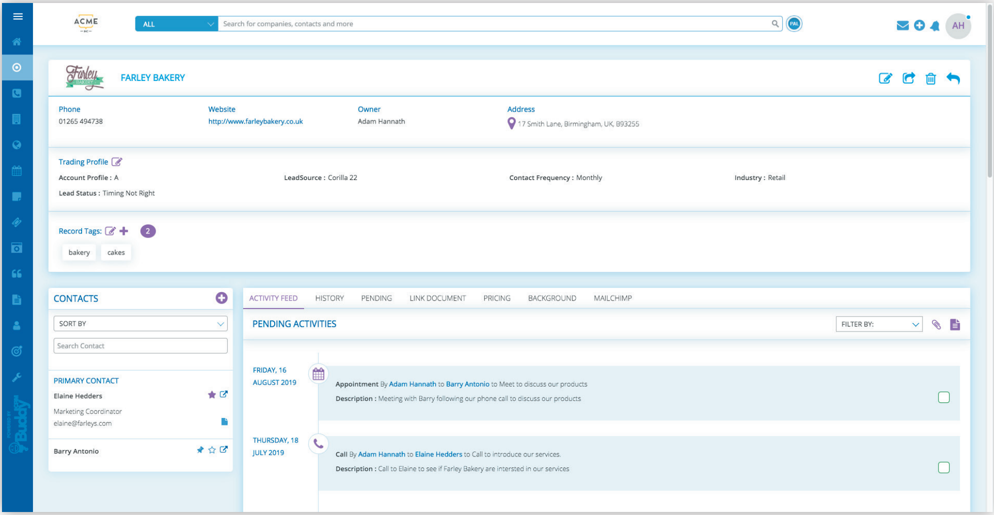


Sales Pipeline & Deal Management

- Manage your opportunities and deals in the sales pipeline from initial meeting through to close.
- Create multiple deals with custom milestones, trigger automatic follow-ups, get real-time deal metrics and predict future revenue.
- No matter how big your sales team is, you'll benefit from a clear understanding of where your team is with their customers in the buying cycle.

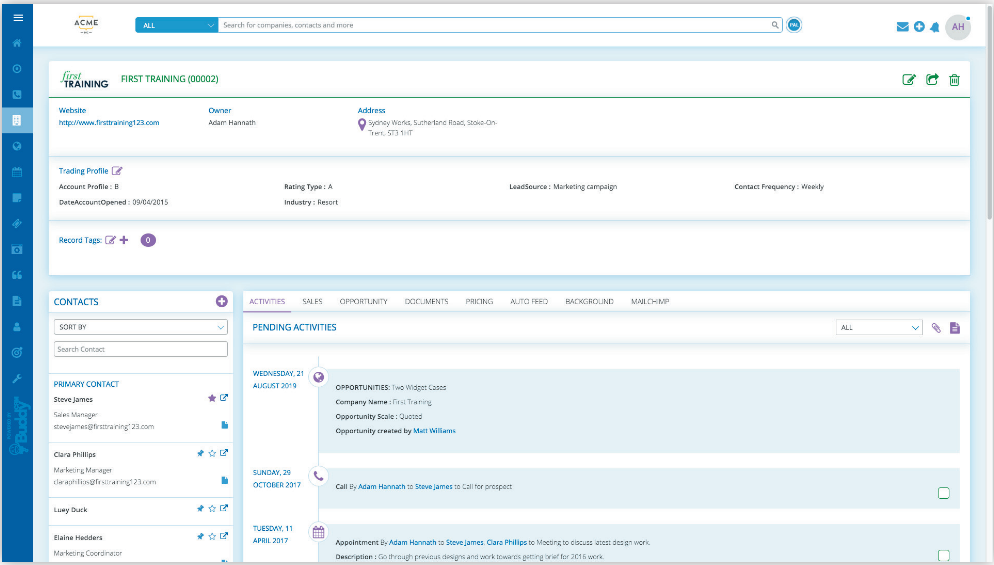
Our Sales Order Processing (ERP), Stock Control and Accounts packages are all automatically synchronised with BuddyCRM, so our sales team can view all customer information in one place. Knowledge is power and we have seen our customer retention and performance levels increase significantly.

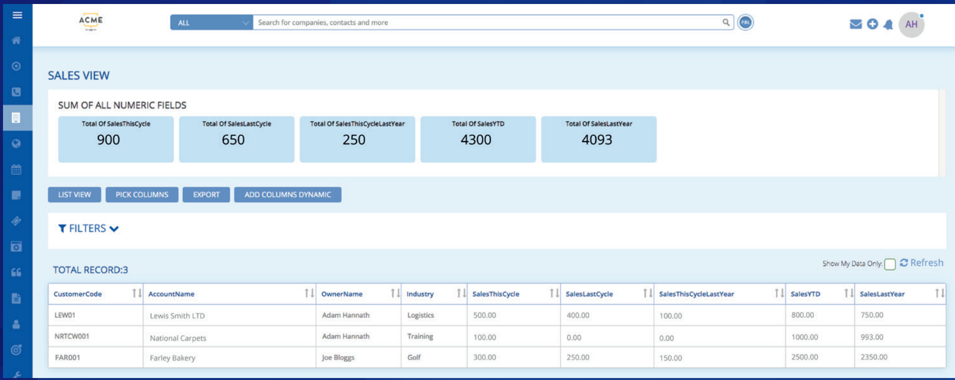
GEMMA TODD, MKG FOODS



Account & Lead Management

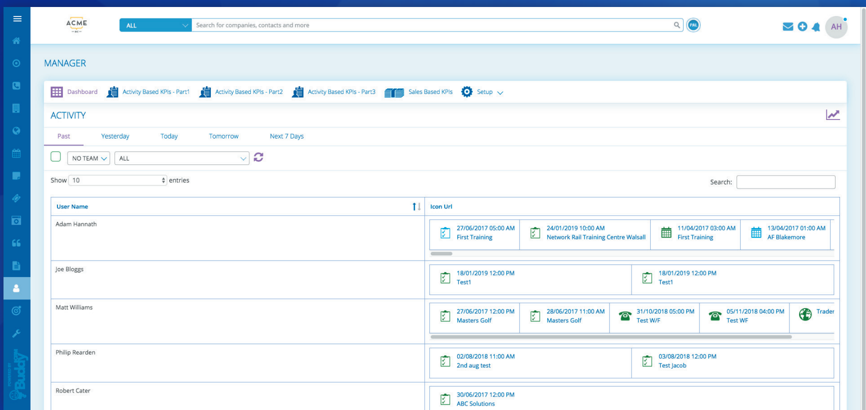
- BuddyCRM separates your Leads or Prospects from your existing customers or Accounts.
- Your history and pending activities are displayed on the lead record card along with documents, contacts, contact informaton, custom fields, and any third-party integrations.





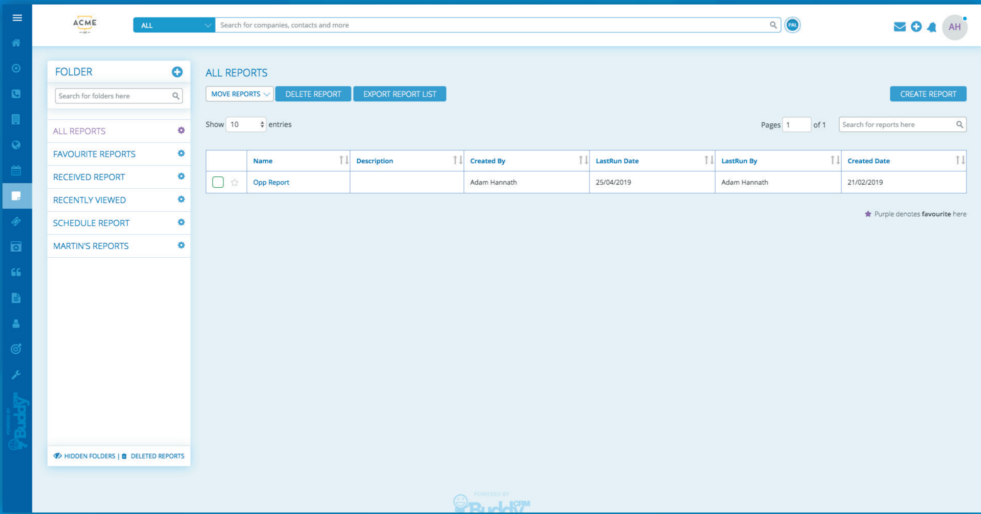
Sales View

- Get a real time view of you and your teams' sales performance.
- Select the sales information you want to display and compare year on year, business cycle now vs last and previous year, display margin and more...
- Apply filters to customise and export your data.
- Create your own dynamic columns to compare sales targets by month and year.



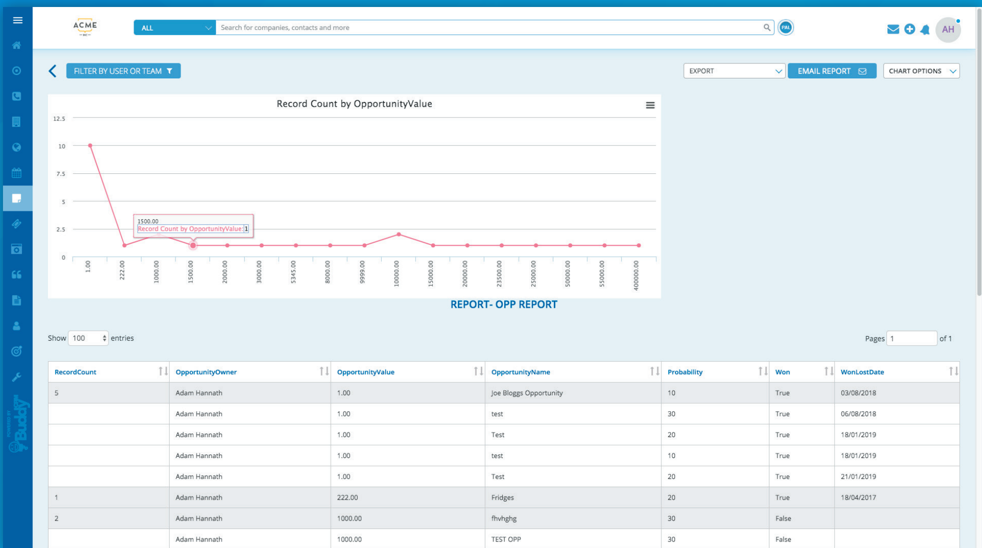
Management Information

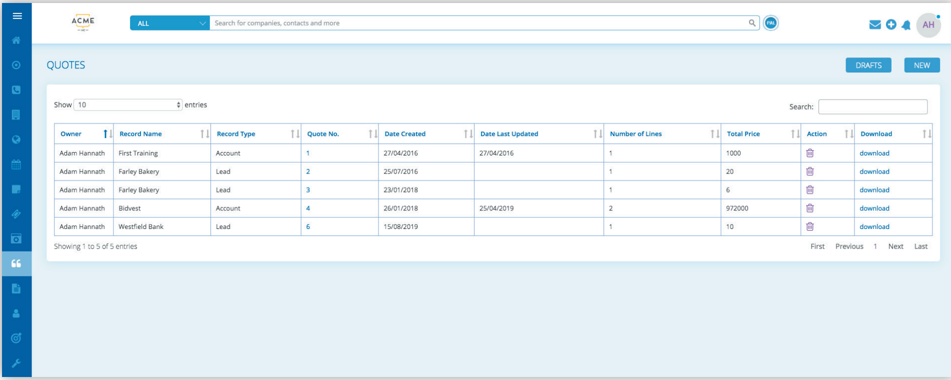
- View the status of your business in real time, on one screen. New leads, hot leads, sales opportunities, why you're winning, why you're losing, support calls and team activity.
- Track your Key Performance Indicators (KPIs), build the reports you want or use Buddy's defaults.



Reporting

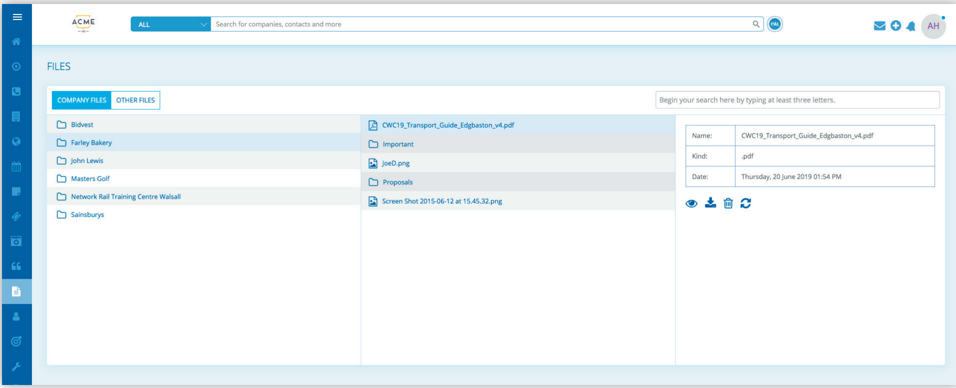
- Deliver the right information for management to make decisions.
- Build your own reports from sales, leads, opportunities, account, and contact information.
- Dive into the data to pick out best practice by your sales team members, check whether targets are being hit, budgets are accurate and accounts are regularly being contacted.





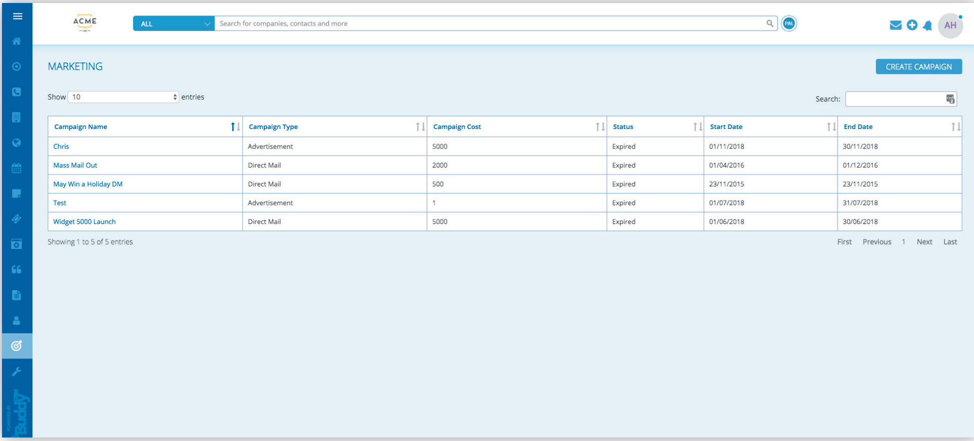
Quotes & Presentations

- Store images, product specifications, build elegant presentations and create and save beautiful quotations without having to leave the system.
- Quickly create documents that can be shared with the team and wow your clients with up to date information.



File Management

- Store key files and documents for the team in a central repository.
- Available to all or set security by group or individual to enable access.

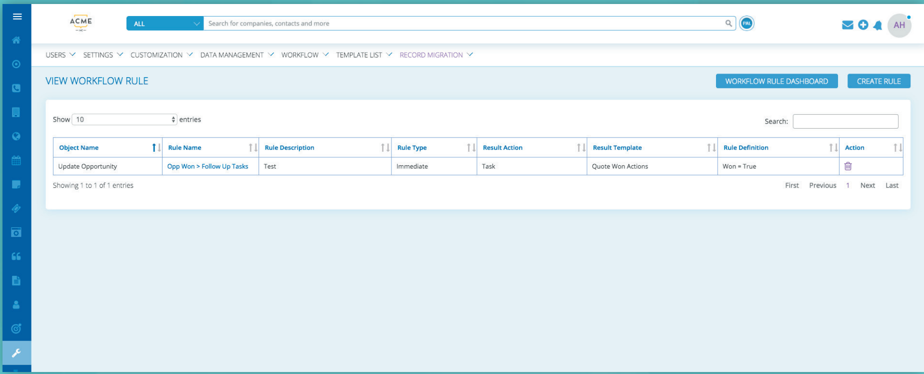


Marketing

- Create your marketing campaigns from your data and store campaign information to determine ROI.
- Buddy CRM connects to Mailchimp, DotDigital and Pure360 - industry leaders in email marketing.
- Your data syncs automatically to their lists so you can send campaigns to the exact target group of prospects from your your customer records.

Connect to other data

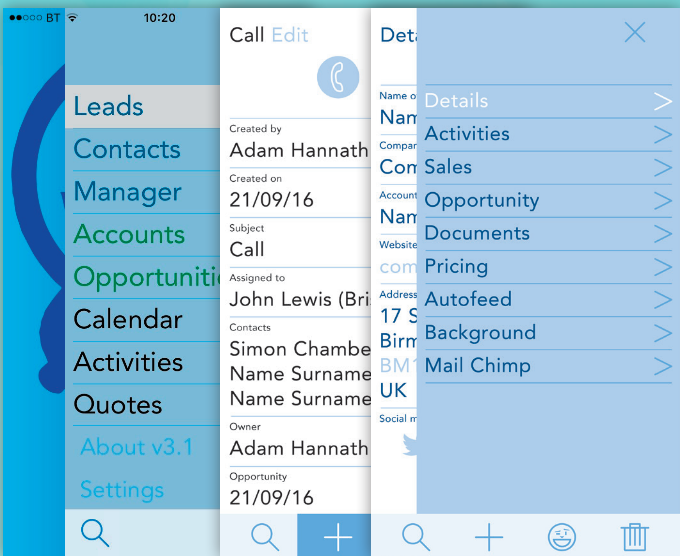
- Use the Buddy API to bring in sales, accounts or any other data from other systems and have it shown right in the account record.
- You'll get a single customer view of everything that's happening with that account.



Workflows

- Automate your everyday tasks and reduce administration.
- Create rules to manage your repetitive tasks such as creating calls, quotes, appointments, tasks, opportunities, through to sending emails or text messages.

- For example:
- Create a follow up call automatically in your diary when you send a quote
- When an opportunity passes a threshold send an SMS to your sales manager
- When a meeting is updated, email the attendees automatically



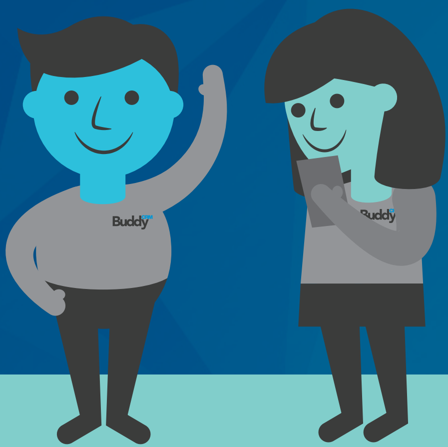
Mobile App

- Following your meeting, update the opportunity directly in the BuddyCRM IOS app and have it instantly available to the other members of your sales team.
- The BuddyCRM app is quick, simple and easy to use with all your history and planned activities available with a quick swipe.

The BuddyCRM di

We pride ourselves on doing things differently. It's our unique approach that makes BuddyCRM the system of choice for sales teams.

- **We're a UK based company** with support also based in the UK. We're not a faceless plc with a sales team based in India or Dublin. You can meet the BuddyCRM team at our offices in Lichfield and equally we're happy to visit you at your business. We'd love to discuss your sales processes and how to implement BuddyCRM in your sales team.
- **We care about the product and developed it to solve problems in our sales roles in our past careers.** It became so successful there that we had to turn it into a viable product for others. Our customers have become loyal 'buddies' and we're happy for you to contact them to discuss using BuddyCRM.



- **We want Buddy to succeed in your company** so we walk everyone through key steps to make sure that you've chosen the right system and everything is in place for success.
- **We're the right size for your organisation.** BuddyCRM fits firmly between the solutions for 1-2 sales people that have limited customisability and the complicated 'enterprise solutions' that take an age to learn and are full of features you don't need.
- **Works with your existing systems.** You won't have to change the systems you use to benefit from BuddyCRM. Our system is designed to work with your accounting package, email software and your marketing tools right out of the box so you can be up and running as fast as possible.
- **Customisable for the perfect fit.** We know all businesses are different so your working practises may need some unique features. We have a team of developers and will work with you to design and develop the features you need to enhance your BuddyCRM system.

fference

We run our business on a few key principles:

- Simplicity is the ultimate sophistication. As far as possible, no action in BuddyCRM should take more than 3 clicks.
- Users perform the same 5% of features 95% of the time – therefore we make these features as easy to use as possible.
- Don't add features unless they really add something – feature creep makes systems bloated and complicated. Our niche is helping sales teams work more efficiently and giving sales managers improved visibility.
- Don't try to do everything. We believe medium sized businesses work best when they have 4-5 pieces of software, each with its own core strength such as sales processing, accounts, email marketing. Our software must easily integrate with all these, out of the box or with little added investment from the customer.

Call 0121 2880808 to find out more...

Why use a CRM?

It's a central place for storing data.

A CRM provides a full, accurate record of a reps entire interaction history with a prospect that's accessible with one click.

It improves communication across an organisation.

Shared information at all levels through your organisation means everyone is on the same page.

CRMs make managers lives easier.

CRMs standardise how reps track their activities and prospect interactions, which streamlines reporting.

It's a sustainable, scalable tool for growth.

Do you want to grow your business? Your ability to do so is dependent on contacting your prospects at the right intervals and providing them relevant information at the right time, and you simply can't do this effectively without a CRM.

> The results have been great, we have now migrated away from using spreadsheets to full integration with Buddy CRM. The switch over was effortless and very well managed by the team at Buddy.

MONK CONVEYORS

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