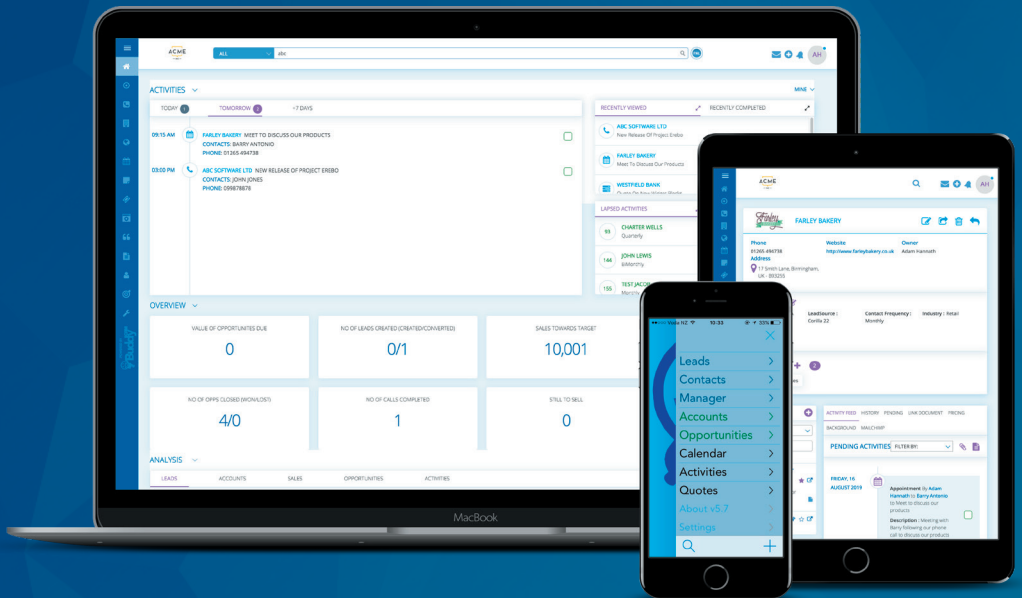


Grow your business

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. "

PHIL BOWN, IVOR KING

The screenshot shows the Buddy CRM dashboard. At the top, there's a navigation bar with 'ACME' and 'ALL abc'. Below it, the 'ACTIVITIES' section is divided into 'TODAY', 'TOMORROW', and '-7 DAYS'. Today's activities include meetings with Farley Bakery and ABC Software Ltd. The 'OVERVIEW' section displays four key metrics: Value of Opportunities Due (0), No of Leads Created (0/1), Sales Towards Target (10,001), and Target (0). On the right, there are panels for 'RECENTLY VIEWED', 'RECENTLY COMPLETED', 'LAPSED ACTIVITIES', and 'MISSED ACTIVITIES'.

This screenshot shows a more detailed view of the Buddy CRM dashboard. It includes the same activity and overview sections as the first screenshot. The 'ANALYSIS' section features a donut chart for 'LEADS BY STAGE' and a bar chart for '# OF LEADS COMPLETED BASED ON ACCOUNT PEOPLE'. Below this, the 'TABLES' section is expanded to show 'ACCOUNTS', which includes a table with columns for Account Name, Owner, Primary Contact, Account Profile, Created On, Next Activity Date, Account Rating Type, and Account Type.

Account Name	Owner	Primary Contact	Account Profile	Created On	Next Activity Date	Account Rating Type	Account Type
2nd Ang Stee	Adrian Hancock	Test Dept	511.000	02/09/2018	null	Client	MOT Car/MOT Motor/Mot/MOT Van/Service Car/Service Caravan/Service Motorbike/Service Van/Tractor/AMF
Bass	Adrian Hancock	Elaine Headless	101.000	09/10/2018	null	A	
Blaize	Adrian Hancock	Colleen Beece	A	29/05/2016	21/02/2017	Prospect	
Claydon Smith	Adrian Hancock	John Williams	A	02/06/2018	02/06/2018	Client	
East Hanning	Adrian Hancock	Steve James	B	09/04/2013	11/08/2017	A	
Footbell	Adrian Hancock	Adam Smith	51.000	09/11/2017	null	Prospect	
Footbell	Adrian Hancock	Carroll Southgate	500 plus	09/01/2018	09/03/2018	Client	
WORKING TEST	Adrian Hancock	John Smith	A	24/04/2018	09/11/2018	A	
John Lewis	Adrian Hancock	Brian Smith	500 plus	29/05/2016	24/01/2018	A	
John Lewis Bristol	Adrian Hancock	Simon Chambers	B	29/05/2016	22/09/2016	A	

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.

Name	Email	Company
ADAM JONES		renew mouse
ADAM SMITH		Trader joes
BARRY ANTONIO		Footbest
BOB EVANS	bob.evans@johnlewis.com	Fairley Bakery
BRIAN SMITH	brian.smith@johnlewis.com	John Lewis
BURT BASSET		John Lewis
CLAIRE FIDDLER	Tony@speedinesports.com	Task Customer 1
CLARA JAMES	Clara.james@firsttraining123.com	Bk
CLARA PHILLIPS	clarahillips@firsttraining123.com	First Training
DANIEL JOHNSON		First Training
DUEY DUCK		Wychbury Care
EDDIE WRIGHT		First Training
ELAINE HEDDERS	elaine@fairleys.com	Acme Inc
FRED WILLIAMS	fwilliams@sainsburys.com	2nd aug test, Bess, Fairley Bakery, First Training, Footbest, John Lewis, Magic Marketing, Westfield Bank
GILES JONES	g.jones@leafarms.com	Sainsburys
GRAHAM RENNIE	grahamrennie@bidwest.co.uk	Leafarms
HUEY DUCK		Bidwest
IAN GREEN		gigapopz
JEFF JONES		Monster Solutions
JOHN DOWLAND	jhdowland@westfield.co.uk	ABC Solutions
		Westfield Bank

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.

SUN	MON	TUE	WED	THU	FRI	SAT
28	29	30	31	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15 Quote on new weight blocks	16 Meet to discuss our products	17
18	19	20	21	22	23	24

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.

ACME ALL Search for companies, contacts and more

OPPORTUNITIES PAL

SEARCH RESULT - 9 Opportunities Found.

Opportunities Won/Lost Opportunities

OPPORTUNITIES

Total Opportunities Value **163,999** Sum of Opportunities over 50% **45,500** Sum of Opportunities Closing the Month **163,999**

PICK COLUMN | MASS ACTION | EXPORT | PIPELINE VIEW Show My Data Only: Refresh

<input type="checkbox"/>	Account Name	Opportunity	Opportunity Owner	Record Owner	Primary Contact	Industry	Account Profile	Lead Source	Opportunity Value	Probability	Closing Date	Last Contacted On	Next Activity Da
<input type="checkbox"/>	Bidtek	Spring Update	Adam Hannah	Adam Hannah	Graham Rennie	Logistics	A	Marketing campaign	5000	20	22/02/2018	20/09/2016	21/02/2017
<input type="checkbox"/>	First Training	Two Widget Cases	Matt Williams	Adam Hannah	Steve James	Resort	B	Marketing campaign	2000	50	21/08/2019	09/04/2015	11/04/2017
<input type="checkbox"/>	Foodfest	l/hvhigh	Adam Hannah	Adam Hannah	Adam Smith		S1-100	Phone in	1000	30	14/11/2017	03/11/2017	null
<input type="checkbox"/>	MORNING TEST	TEST OPP	Adam Hannah	Adam Hannah	John Smith		A	Article/blog/research	1000	30	23/04/2018	24/04/2018	08/11/2018
<input type="checkbox"/>	Martin Corilla	Main	Adam Hannah	Adam Hannah	Joe Blogs	Manufacturing	Marine	Lead Service	55000	30	30/11/2018	08/11/2018	03/11/2020
<input type="checkbox"/>	hiring Types Test	dfs	Adam Hannah	Adam Hannah	Test Test		A	Article/blog/research	20000	50	09/08/2018	06/08/2018	null
<input type="checkbox"/>	Sainsbury	750 Boom Toys	Adam Hannah	Adam Hannah	Fred Williams	Consumer Goods	101-500	Website	25000	70	28/02/2018	17/01/2018	21/09/2016
<input type="checkbox"/>	Test WFF	Test	Adam Hannah	Adam Hannah	J Thompson		A	Article/blog/research	9999	30	30/11/2018	01/08/2018	31/10/2018

ACTIVITIES SALES OPPORTUNITY DOCUMENTS PRICING AUTO FEED BACKGROUND MATCHSHIP

OPPORTUNITIES ANALYSIS

OPEN

OPPORTUNITY NAME	OWNER	VALUE	CLOSE DATE	%
Two Widget Cases	Matt W	2000.00	21/08/2019	58 %

WON LOST

Range up following our direct mail piece: Needs Two Widget Cases

Write a Comment

No Comment Exists

Probability Question

- Customer Contacted
- Need identified.
- Quoted.

Value

20

20

Barrier to Trade: Price

Campaign: Mass Mail Out

Income Date: MM YYYY

Course Training Requirements: 10 employees for First Starter Sales - level 2.

Preferred Date 1: 03/09/2019

Preferred Date 2: 04/09/2019

Preferred Dates 3: 03/09/2019

Preferred Location 1: Nottingham

Preferred Location 2: Oxford

Preferred Location 3: Birmingham

PRODUCT LINKED

Name	Price	Edit/Delete
Specials	1000	
Trailer Rental	5.00	

CONTACT ROLES

Name	Role
No Linked Contacts Exists	

ACTIVITIES

No activity exists

CLOSED

OPPORTUNITY NAME	OWNER	VALUE	WON/LOST DATE	%
------------------	-------	-------	---------------	---

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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 probability and total opportunity value.

ACME | ALL | Search for companies, contacts and more

OPPORTUNITIES PAL

SEARCH RESULT - 9 Opportunities Found.

Opportunities | Won/Lost Opportunities

OPPORTUNITIES

- Total Opportunities Value: 163,999
- Sum of Opportunities over 50%: 45,500
- Sum of Opportunities Closing the Month: 163,999

LIST VIEW | Show My Data Only: | Sort By: OPPORTUNITY VALUE | Refresh

10 | 20 | 30 | 40 | 50 | 60

Stage 20 Opportunities:

- Spring Update**
 #Quick Edit
 Company Name: Bidvest
 Owner Name: Adam Hannath
 Opportunity Value: 50000.00
 Closing Date: 22/02/2018
- Martin**
 #Quick Edit
 Company Name: Martin Corilla
 Owner Name: Adam Hannath
 Opportunity Value: 50000.00
 Closing Date: 30/11/2018
- Test**
 #Quick Edit
 Company Name: Test WF
 Owner Name: Adam Hannath
 Opportunity Value: 9999.00
 Closing Date: 30/11/2018
- flvhghg**
 #Quick Edit
 Company Name: Foodtest
 Owner Name: Adam Hannath
 Opportunity Value: 1000.00
 Closing Date: 14/11/2017
- TEST OPP**
 #Quick Edit
 Company Name: WORKING TEST
 Owner Name: Adam Hannath
 Opportunity Value: 1000.00
 Closing Date: 25/04/2018

Stage 50 Opportunities:

- disc**
 #Quick Edit
 Company Name: Rating Type Test
 Owner Name: Adam Hannath
 Opportunity Value: 20000.00
 Closing Date: 09/08/2018
- Two Widget Cases**
 #Quick Edit
 Company Name: First Training
 Owner Name: Matt Williams
 Opportunity Value: 2000.00
 Closing Date: 21/08/2019

Trader J
 #Quick Edit
 Company Name:
 Owner Name:
 Opportunity Value:
 Closing Date: 2

powered by Buddy
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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.

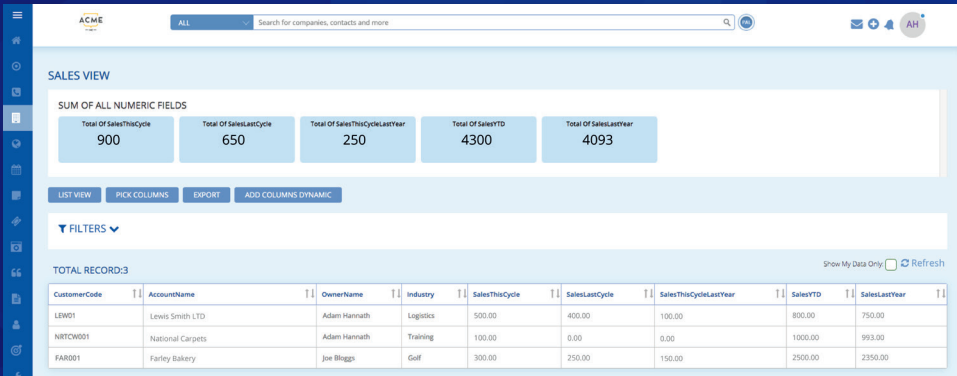
GEMMA TODD, MKG FOODS

The screenshot shows the BuddyCRM interface for a lead record for Farley Bakery. The top navigation bar includes the ACME logo, a search bar, and user profile information (AH). The lead record header displays the company logo and name. Below this, key information is organized into sections: Contact details (Phone: 01265 494738, Website: http://www.farleybakery.co.uk, Owner: Adam Hannath, Address: 77 Smith Lane, Birmingham, UK, B9325G), Trading Profile (checked), Account Profile (A), Lead Status (Timing Not Right), LeadSource (Corilla 22), Contact Frequency (Monthly), and Industry (Retail). Record tags include 'bakery' and 'cakes'. A 'CONTACTS' sidebar lists primary contact Elaine Hedders and Barry Antonio. The main 'PENDING ACTIVITIES' section shows two entries: a meeting on Friday, 16 August 2019, and a call on Thursday, 18 July 2019.

Account & Lead Management

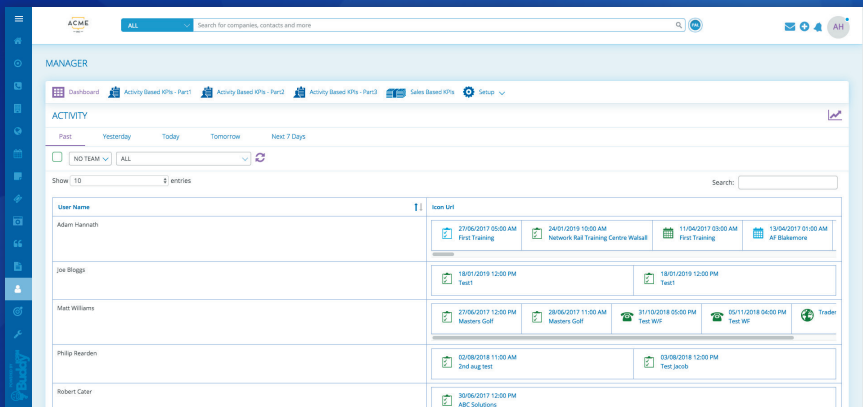
- BuddyCRM separates your Leads or Prospects from your existing customers or Accounts.
- Your history and pending activities are displayed on the lead record card along with documents, contacts, contact information, custom fields, and any third-party integrations.

The screenshot shows the BuddyCRM interface for an account record for First Training. The top navigation bar is identical to the previous screenshot. The account record header displays the company logo and name. Below this, key information is organized into sections: Website (http://www.firsttraining123.com), Owner (Adam Hannath), Address (Sydney Works, Sutherland Road, Stoke On Trent, ST4 1HT), Trading Profile (checked), Account Profile (B), Date Account Opened (09/04/2015), Rating Type (A), Industry (Retail), LeadSource (Marketing campaign), and Contact Frequency (Weekly). Record tags include '1'. A 'CONTACTS' sidebar lists primary contact Steve James and other contacts Clara Phillips and Lucy Duck. The main 'PENDING ACTIVITIES' section shows three entries: an opportunity on Wednesday, 21 August 2019, a call on Sunday, 29 October 2017, and an appointment on Tuesday, 11 April 2017.



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.

ACME | ALL | Search for companies, contacts and more

FOLDER | Search for folders here

ALL REPORTS | MOVE REPORTS | DELETE REPORT | EXPORT REPORT LIST | CREATE REPORT

Show 10 entries | Pages 1 of 1 | Search for reports here

Name	Description	Created By	LastRun Date	LastRun By	Created Date
Opp Report		Adam Hannath	25/04/2019	Adam Hannath	21/02/2019

★ Purple denotes favourite here

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.

ACME | ALL | Search for companies, contacts and more

REPORT- OPP REPORT | FILTER BY USER OR TEAM | EXPORT | EMAIL REPORT | CHART OPTIONS

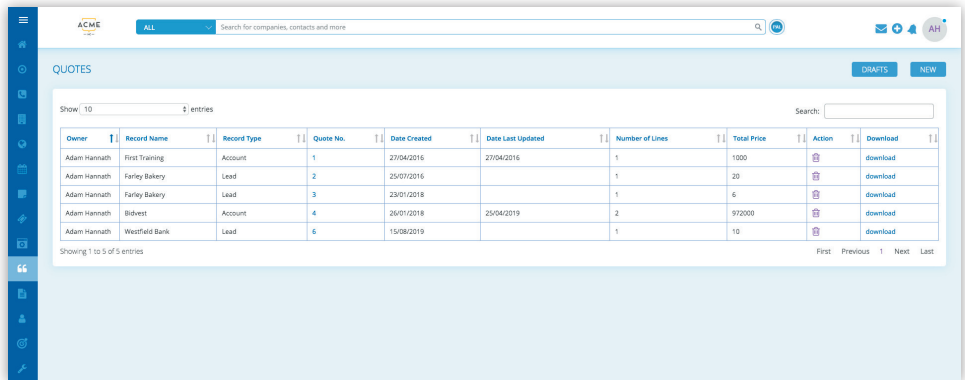
Record Count by OpportunityValue

RecordCount

OpportunityValue

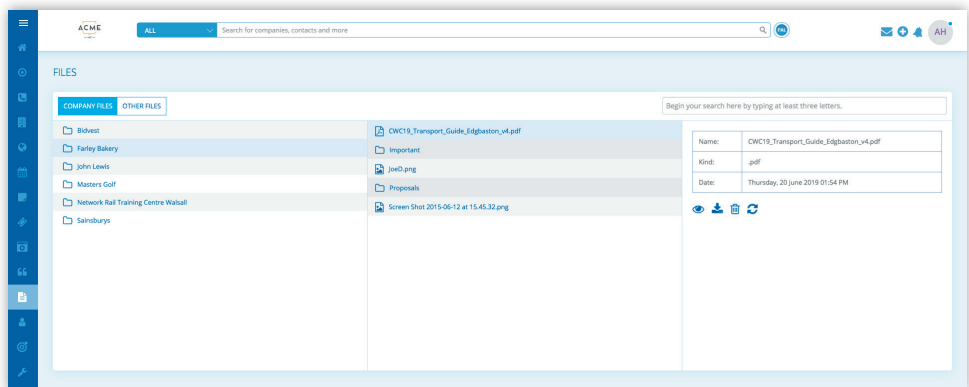
RecordCount	OpportunityOwner	OpportunityValue	OpportunityName	Probability	Won	WonLostDate
5	Adam Hannath	1.00	Joe Bleggs Opportunity	10	True	03/08/2018
	Adam Hannath	1.00	test	30	True	06/08/2018
	Adam Hannath	1.00	Test	20	True	18/01/2019
	Adam Hannath	1.00	test	10	True	18/01/2019
	Adam Hannath	1.00	Test	20	True	21/01/2019
1	Adam Hannath	222.00	Hridges	20	True	18/04/2017
2	Adam Hannath	1000.00	fruhghg	30	False	
	Adam Hannath	1000.00	TEST OPP	30	False	

Show 100 entries | Pages 1 of 1



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.

ACME ALL Search for companies, contacts and more

MARKETING CREATE CAMPAIGN

Show: 10 2 entries Search:

Campaign Name	Campaign Type	Campaign Cost	Status	Start Date	End Date
Chris	Advertisement	5000	Expired	01/11/2018	30/11/2018
Mass Mail Out	Direct Mail	2000	Expired	01/04/2016	01/12/2016
May Win a Holiday DM	Direct Mail	500	Expired	28/11/2015	28/11/2015
Text	Advertisement	1	Expired	01/07/2018	31/07/2018
Widget 5000 Launch	Direct Mail	5000	Expired	01/06/2018	30/06/2018

Showing 1 to 5 of 5 entries First Previous 1 Next Last

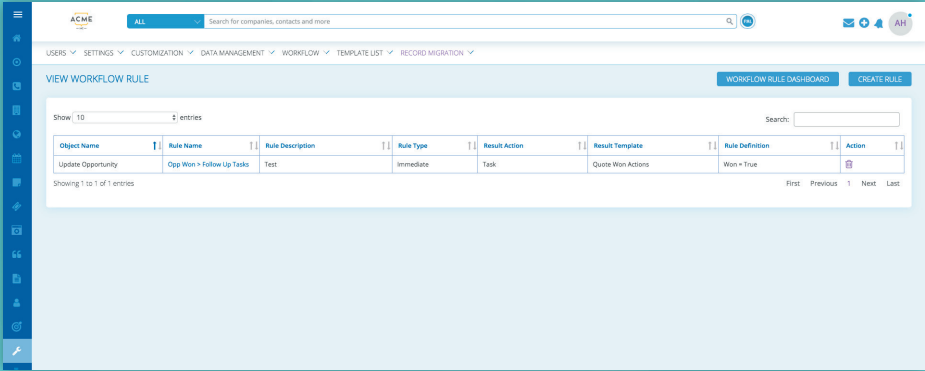
Marketing

- 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 customer records.



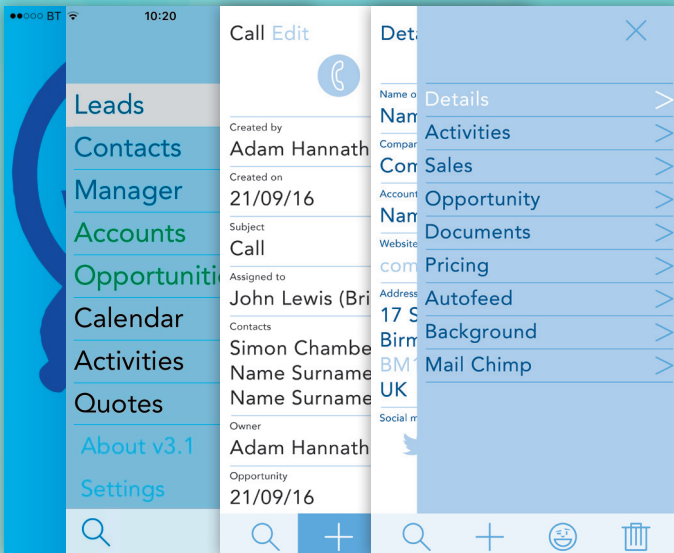
Connect to other data

- 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



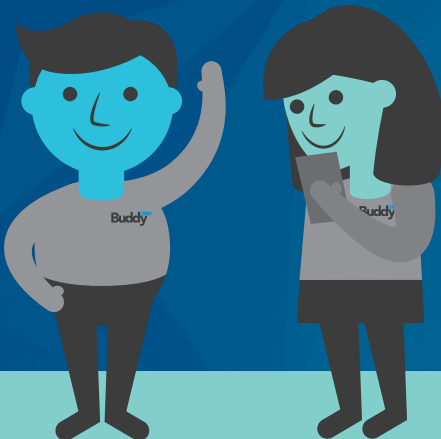
Mobile App

- 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

Buddy^{CRM}

sales • support • marketing

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AS USED BY

