

CRM

Agile CRM and Sales Automation

Bring agility to your sales team with Agiloft's CRM and Sales Automation solution. Streamline and optimize your sales process, automate time-consuming follow-up tasks, and actively monitor your customer engagements to close deals faster and increase upsell and renewal rates.

How It Works

Agiloft integrates your customer information with related business processes for a true 360-degree view of your customer relationships. You can track every aspect of customer interactions in one place, align support priorities with sales objectives, and improve the customer experience throughout the sales cycle.

Agiloft provides a completely customizable solution with no hidden fees and no surprises.

“Microsoft CRM couldn't meet our unique needs,
but Agiloft did so easily.”

– David Hlavac,
Hot Topic Media

Benefits

- **Capture leads from your website** and marketing campaigns, route them to the appropriate sales staff, send automatic follow-up emails, and run scripts to provide timely, context-sensitive offers.
- **Reduce response times** and improve the effectiveness of emails by automating and standardizing communications.
- **Improve upsell and renewal rates** by providing better service throughout the sales and post-sale cycle.
- **Optimize your sales process** with real-time, dynamic analysis that helps you discover success patterns so you can replicate those strategies across your team.
- **Work efficiently** with Quick Edit capabilities that allow you to make record changes on the fly.

Agiloft Has Everything You Need

- **Quote templates** allow you to quickly create accurate sales quotes by automatically populating line items based on your organization's available products and services.
- **Integrated live chat** enables real-time communication with prospects so you can provide answers on the spot.
- **Email templates** make it easy to create dynamic, custom-branded email communications for announcements, special offers, and more.
- **Granular permission controls** provide security throughout your organization and allow you to give users exactly the access they need.
- **Workflow and business rules** automate standard procedures, streamline communications, and trigger automatic notifications to ensure nothing falls through the cracks.
- **Escalation rules** notify managers when they are needed to resolve deadlines, missed milestones, or approval bottlenecks.
- **Graphical charts, reports and dashboards** provide actionable insight into sales forecasts, performance, campaigns, expenses, and more.
- **Single sign-on capabilities**, provided by LDAP/Active directory, SAML, or Google OAuth, simplify access.
- **Full auditability** is provided through historical snapshots that display the entire customer record as it existed at any point in the past.

Many products claim to be flexible and quick to customize, but Agiloft will actually prove it to you.

For More Information

Contact Agiloft today at 1-888-727-2209, Ext. 1 or visit <https://www.agiloft.com> to learn more about CRM and Sales Automation with Agiloft.

About Agiloft

Over 3 million users at organizations ranging from small enterprises to U.S government agencies and Fortune 100 companies depend on Agiloft's top rated product suites for [Contract Management](#), [Service Desk](#), [Custom Workflow](#), and more. Agiloft specializes in automating processes that are too complex for competing vendors. Our best practice templates and adaptable technology ensure rapid deployment and a fully extensible system. For more information, visit <https://www.agiloft.com>.