

Stock Brokers Sales CRM+



Stock Brokers Sales CRM+ Workflow



Campaign Management

Campaign management delivers the capability to link marketing campaigns directly to CRM+ by automating the marketing efforts and then targeting ideal customers using multi-campaign.

Activity Tracking

Track the daily activities done by every employee. It helps the management to View the Daily works sheet of every employee. The Module also helps to add reminders to the team. Y. Also helps to track effort spent on every customer.

Mask Mobile Numbers

Connect the customers to Lead owners, sales person, without revealing their phone numbers. Call masking is the best way for businesses to safeguards customer identity, and prevent misuse of sensitive information like customer's phone number.

Contact Management

Contact management enables users to easily store and access the customer's information. The databases that provide a fully unified access to tracking of all information and communication activities relate to contacts.

Round Robin Method

Allows to customise which lead or how many leads each salesperson should get, works with leads added via the API and allows personalised lead assignment notifications to the sales team.

Lead Management

Capturing leads from multiple sources& campaigns. Helps to manage, track & qualify all activities of prospects. Auto-scheduled follow-ups for appointments, Automatic Notifications, and Reminders.

Reminders

The Employee gets daily reminder via Email every day in their Email box. This helps the team to plan their day effectively. The team also gets timely sms Reminders & Mobile Notifications about appointment. Automatic call can be Triggered for the Calling Reminders.

Mask the Mail ID

Sends Email , Quotes to the customers, without revealing their Email to the sales person. This feature masks the email addresses helps to ensure the privacy of the customer's data. Email Masking secures the data & safeguards the client details.

CTI Integration

By CTI Integration, all the data can be stored in a secured, centralized database and are accessible with a simple click. CTI system that can ceaselessly harmonize with TreeOne Auto CRM+

City Based Access

Use record-based security to control access to records. Access rights can be granted to a user based on particular record.

Opportunity Management

Mapping an opportunity with customers will track potential customers. One click Quotation from Opportunities and Products listed in the masters will be automatically added to the Quote.

SMS & Email integration

To seamlessly interact with customers, a business needs a reliable CRM with SMS/ E-Mail integration. By regulating communication with the customers through status notification & updates

EKYC / KYC

Track the Status of the KYC & every stage, starting document collected, Document Pending, Document status from HO, Documents pending reason from HO, Upload Activated list from Back office, Segment wise activation list. Provides live API integration updates from KYC forms.

362° view

362-degree customer view can get a complete history of customers by aggregating data from the various touch points that a customer from lead to purchase of products

Track Turn Around Time

Tracks the time interval from the time of lead to the time of the completion of the purchase process. It can also measures time periods spent to get a sales conversion.

11 Reasons to buy Treeone CRM+



Capture all leads
in one place



Know your ROI
for every AD



know which medium
gives you better
results



Know your conversion
ratio of every
employee



Known your top
performing employee



Know your top
performing branch



Know your
turn around time
for conversion



Assign targets
to team



Auto calculated
incentives



Masking telecaller's
Mobile Number



Detailed Analytics



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