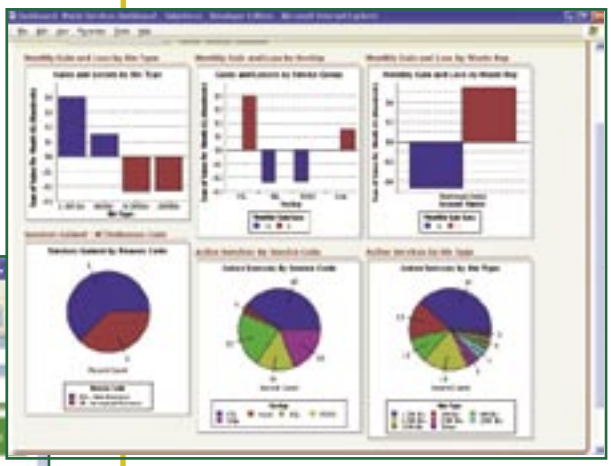
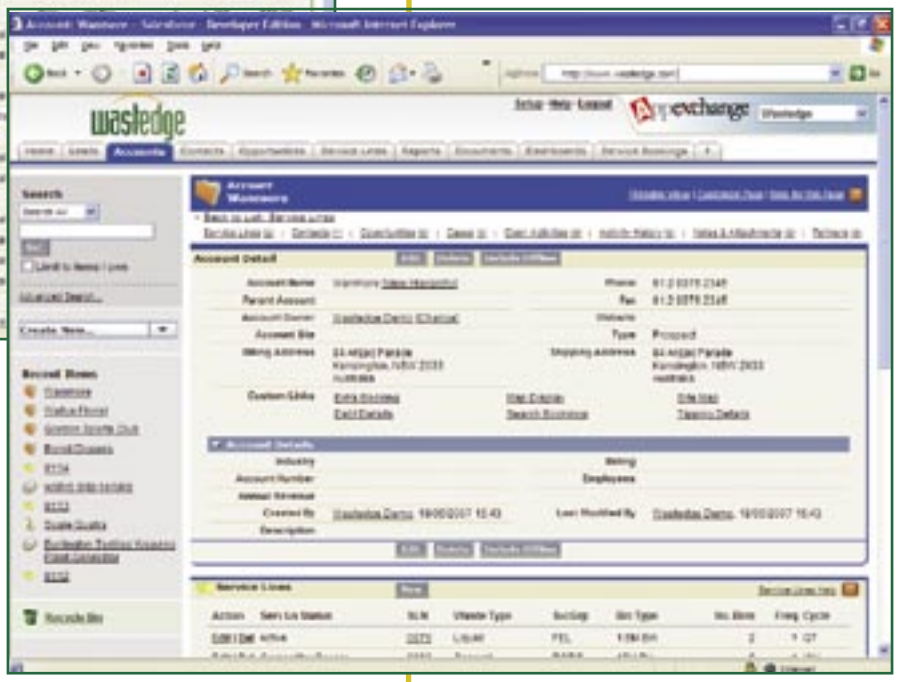
WasteRepCRM

Sales Rep Waste Services Opportunity Management

WasteRepCRM is an entry level set of extensions to the Salesforce CRM Customer Relationship Management system for contact and opportunity management facilities that will help waste reps or internal sales staff to capture and summarise waste service requirements for prospects.

Features include a separate waste services folder for capturing sales data about waste service requirements such as number of bins, bin size, waste type expected, collection frequency, required start date and site specific bin placement directions as well as competitor pricing. Quotations for opportunities can be produced for new service contracts through mail merge. Sales managers can also review weekly/monthly sales-rep performance summaries and gains/losses statistics dashboards.





Features:

- New custom fields for Opportunities and Accounts:
  - Service group, Waste Type, Bin Size
  - Service Frequency/cycle (eg 3/wk)
  - Number of bins, Rate per service
- New Services List (across all customer sites)
- Gains and Losses Reporting
- Sales Rep Performance KPI Dashboards

Supported features:

- Quotation mail merge from opportunity data
- Conversion of opportunity to account services setup
- User defined picklists for Service/waste type, bin size
- Site bin location and site contact/access directions
- Integrated Google Maps

Business Benefits:

- Provides Gains/Losses data
- Helps produce quotes
- Integrates CRM to accounts
- Never forget follow-ups

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The measure of best practice in the Waste Industry