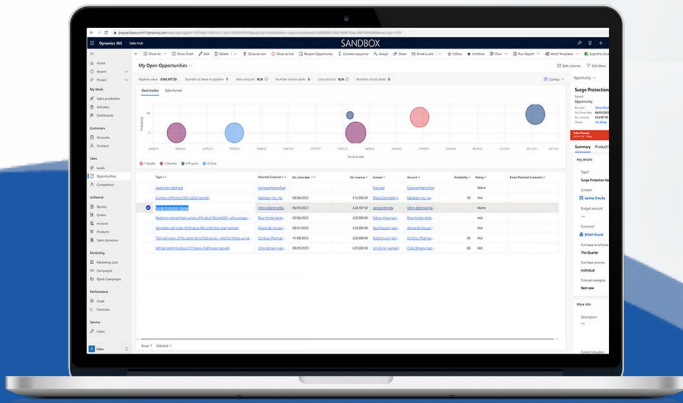




Sales Lite



Cloud9 Insight

The new Sales CRM tool for SMBs brought to you by Cloud9 Insight.

Price: One-off implementation cost of just £4,995 and monthly subscription fees starting at £399pcm for up to 3 users.

- Do you find that your sales processes and lead management is just not fit for purpose?
- Do you need a sales tool that integrates seamlessly with your Sales CRM & Microsoft 365 Solutions?
- Do you need a robust but simple sales tool that has everything you need without the features you would not use?
- Do you need a cost effective, easy to use, simple to implement sales management tool?

Introducing Sales Lite - everything you need at a fraction of the cost and time that a normal CRM implementation takes.

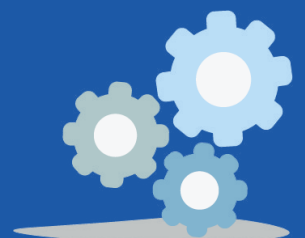
Are you an SMB with sales management needs but without the budget or time to invest in bigger more costly sales tools? With Sales Lite you can be up and running within 7 days.

We know that sometimes SMBs need a sales tool that caters for their specific needs. Big enough to do what you need but small enough not to cost the earth to buy and implement.

The need to invest in a sales management tool can be restrictive for SMBs due to the exorbitant costs to buy and implement the bigger tools that are available. If your business is looking for a cost effective, quick and easy to implement sales management tool then read on to find out more about Cloud9's Sales Lite option.

So why Cloud9 Sales Lite?

Sales Lite is a simple to use variant of one of the bigger Sales CRM tools that are available on the market – it still incorporates all the key functionality that you will need but at a fraction of the cost.



Key features and benefits:

Deployment of Microsoft Dynamics 365 for Sales:

- Leverage Microsoft's recognisable application design that your users know and use daily.
- Access to Microsoft AI automations to further guide seller behaviours.
- Ready-made integration to other Dynamics related applications as your business grows.
- Access to Microsoft Power Platform for simple future extensions and integrations.
- Accessible from the cloud, accessible anywhere with no servers required.
- All your data secured and stored on resilient, restorable enterprise grade Microsoft infrastructure.

Sales pipeline and account management:

- Lead to prospect tracking with visibility across all sales users and management.
- Simple and clear pipeline dashboards using the new Sales Pipeline view tool.
- Track activity timelines to ensure your team members have a single view of every interaction with each client.
- Segment leads with custom data points.

Data import:

- Bring in your existing accounts, contacts, and sales leads.

Integration to your other Office products (Outlook, Teams, and SharePoint):

- Connect Dynamics to email, appointments, team chats to allow better collaboration.
- Deploy Dynamics 365 App for Outlook to manage Dynamics records directly from Outlook.
- Reduce Dynamics storage capacity by using your existing SharePoint storage for sales documents.

Access to Dynamics Mobile Apps:

- Includes access to Microsoft's Sales apps for Android or iPhone users.
- Deployable on mobile or tablet devices.
- Use Business Card scanning to capture leads and contacts with less effort.

Project commencement to deployment in 7 days:

- Known fixed deployment time.
- No project slippage or increased costs.
- Plan for a time to launch that suits your resources.

Configured to your business:

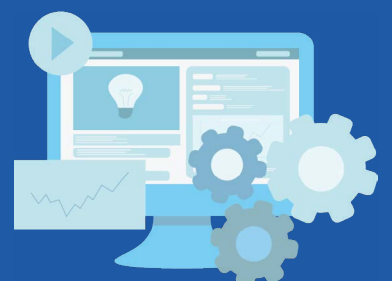
- Ability to add small customisations such as data points that are unique to your business.
- Set up a Product Catalogue to allow more detailed sales.
- Set up recommended price lists to guide seller pricing.
- Branded company template to send Quotes and Orders to your customers.

Training:

- Live System Administrator training.
- Live End User training.
- Additional video resources to refresh user training post-event.

Cost effective deployment:

- Enterprise capable product installed on a fixed price budget.



Lead to Opportunity Sale | Qualify (41 D)

CONTACT

Topic: Store is expanding - send new literature (sample)

First Name: Debra
Last Name: Garcia (sample)
Job Title: Owner
Business Phone: (508) 555-1234
Mobile Phone: (508) 555-1234
Email: debra.garcia@sample.com

COMPANY

Company: Web World Expansion
Website: http://www.webworldexpansion.com/
Street 1: 1000 Washington Ave.
Street 2: ---
Street 3: ---
City: Bethel
State/Province: WA
ZIP/Postal Code: 98008
Country/Region: U.S.

My Open Opportunities

Pipeline value: £140,877.50 | Number of deals in pipeline: 7 | Work amount: N/A | Number of won deals: 0 | Lost amount: N/A | Number of lost deals: 0

Deal tracker: [Bubble chart showing deal progress over time]

Topic	Potential Customer	Est. close date	Est. revenue	Contact	Account	Probability	Rating	Email (Potential Customer)
Lead basic field test	Compass Client Chat			Hot Lead	Compass Client Chat		Warm	
6 orders of Product SKU J024 (sample)	Fabrakan Jim Na	08/04/2023	(19,000.00)	Maria Campbell J	Fabrakan Inc Jap	90	Hot	
Surge Protection Range	Olivia Electrical Bz	06/05/2023	(24,187.50)	Jacobs Orvola	Olivia Electrical Bz		Warm	
Needs to restock their supply of Product SKU AX002 - will purchase...	Blue Thunder Airco	05/06/2023	(25,000.00)	Sidney Hipsa Jann	Blue Thunder Airco		Hot	
New likely will order 18 Product SKU J002 this year (sample)	Alonso Ski House J	08/07/2023	(30,000.00)	Dan Cannon Jann	Alonso Ski House J		Hot	
They will many of the same items that we do - need to follow up (a...	Corvus Pharma J	11/08/2023	(26,000.00)	Robert Lyon Jann	Corvus Pharma J	95	Hot	
Will be ordering about 150 items of all types (sample)	Cuba Winery Jann	09/09/2023	(25,000.00)	Jim Green Jannster	Cuba Winery Jann	80	Hot	

Visit www.cloud9insight.com/sales-lite where you can find out more about this including what functionality is included in Sales Lite and other products we offer, you can also book a demo or request a no obligation call back to discuss how we can help solve your challenges and help your business grow.

Email: sales@cloud9insight.com
Or give us a call on +44 (0)1273 921520