What is CRM?

CRM stands for “Customer Relationship Manager “CRM software allows businesses to manage customer and prospect relationships with data. You can store, track, and analyze customer and prospect information in one central location, including contact and account information, sales opportunities, service cases, and marketing campaigns. With data in one central location, organizations have a complete picture of customers and prospects that can be shared and analyzed by teams across the company in real-time. Implementing the right CRM can increase sales efficiency by several folds. You can close more deals, boost sales, and improve forecast accuracy.

Why You Need CRM?

1. There’s no single source for information
2. No or less visibility on how customers are interacting with employees.
3. Lack insight about what the salesperson are doing which makes it difficult to keep them accountable.
4. Generating reports and analytics is hard.
5. Important data gets lost in handwritten notes and personal computers.
6. Resell/Upsell opportunities are lost.
7. You lack a Plan to scale-up fast.

How CRM Helps?

CRM benefits a company in various ways. Six important benefits of CRM platforms that affect every user include:

1. Dashboards that virtually showcase data at a glance.
2. Automated and instant communications.
3. Pipeline view of the leads and prospects.
4. Efficient organization of data and consistent Follow-ups.
5. Efficiency is enhanced by automation.
6. Trustworthy reporting of Data at a place.

Purpose of the CRM Handbook

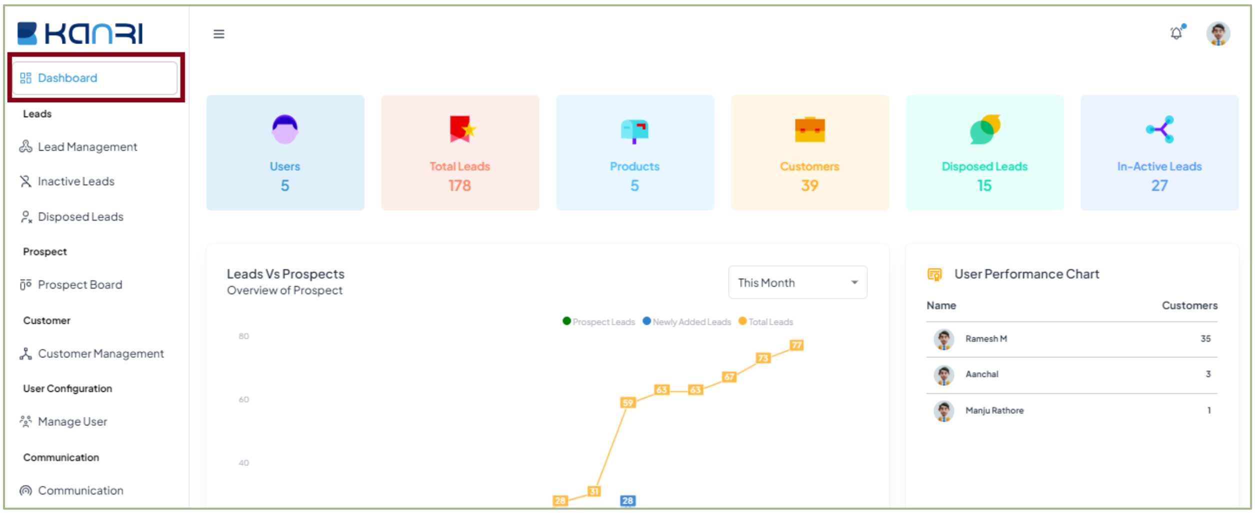
This Handbook for Our CRM **Kanri** will guide you through our software for onboarding and will ensure that users understand its features, functionality, and best practices for effective implementation.

Introduction

Kanri is a CRM Application designed and developed by **Stew India-Ad Innovations** which helps in managing Business-Leads inside a single common platform. The leads inside the CRM can be converted into a possible **prospect** in just a single click and through simple **drag and drop** the prospect can be moved to various stages of business flow, the status can be evaluated very easily by Kanban structure dashboard.
The CRM also gives you an amazing experience of automated and manual communications to your leads like SMS's, WhatsApp, Emails and Voice calls where through an Omni channel you can be doing communications and conversions very efficiently. **Kanri-CRM** helps business to manage the business along with sales conversions at a higher pace. It will help you manage your sales more effectively and efficiently. Small businesses grow faster by getting better if every lead is managed and followed up effectively.

Features Of Kanri

- **Dashboard :**

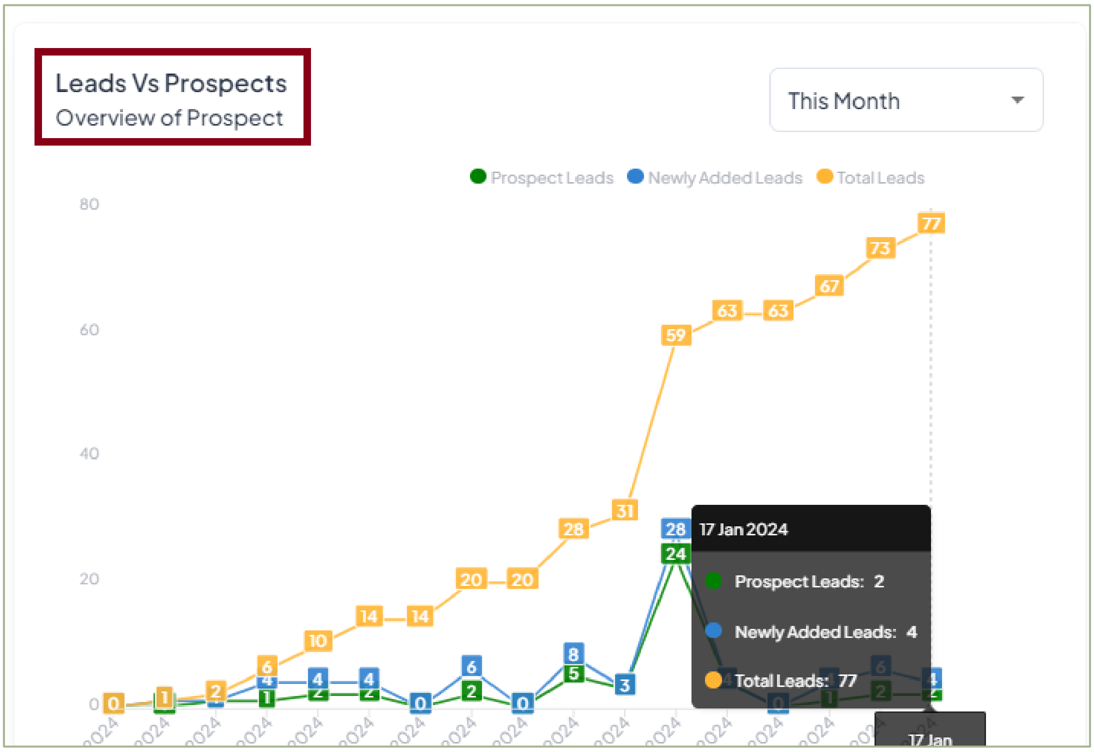


Dashboard

In Kanri you will get one glimpse Dashboard which will provide you statistical data like your Total lead present in system, Total prospect counts, Your customer counts, Team performance on a single screen with the help of which you can plan the sales strategy as well as the status check of your sales team. The Dashboard also provides the Leads Vs Prospect data which helps in managing the marketing campaigns. The dashboard also gives you an analysis of top selling products in your company and last team on boarded status which gives the glimpse of sales frequency to admin and CEO's.

Let us visualize the dashboard features in detail

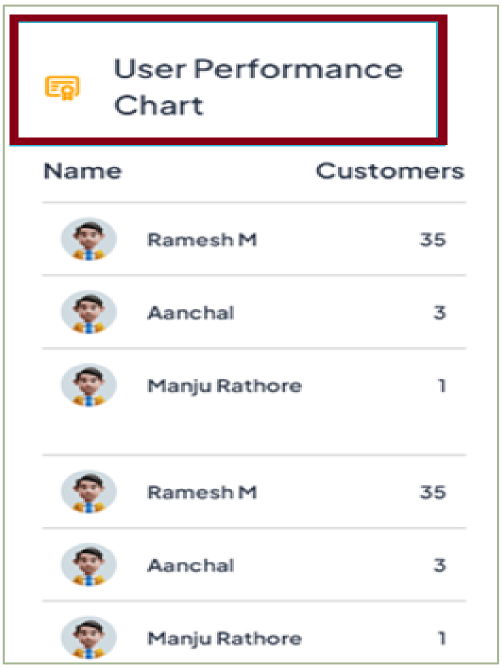
- **Lead vs Prospects Graph:**



Lead Vs Prospect

This Screen helps a manager in understanding the pattern of leads vs prospect.This data can be used by managers in analyzing the quality of leads and helps the marketing team to manage their marketing campaigns more efficiently.

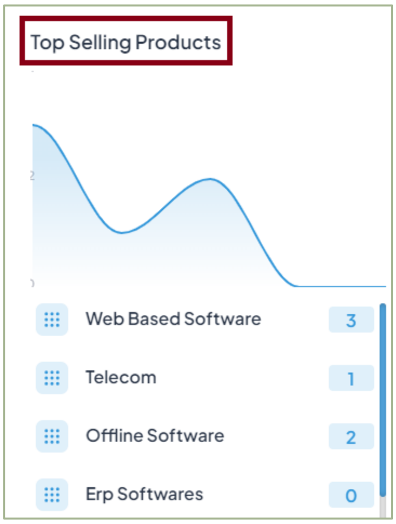
- **User Performance Chart:**



User Performance Chart

This chart will help a manger to understand the performance of his team members and can extend support if someone is not performing as expected as well appraise the extraordinary performer.

- **Top selling Products**



Top selling products

This section will provide you a glance of your most liked product by the audience so that you can plan your stocks accordingly or strategize sales respectively in the right direction.

- **On boarded Business:**

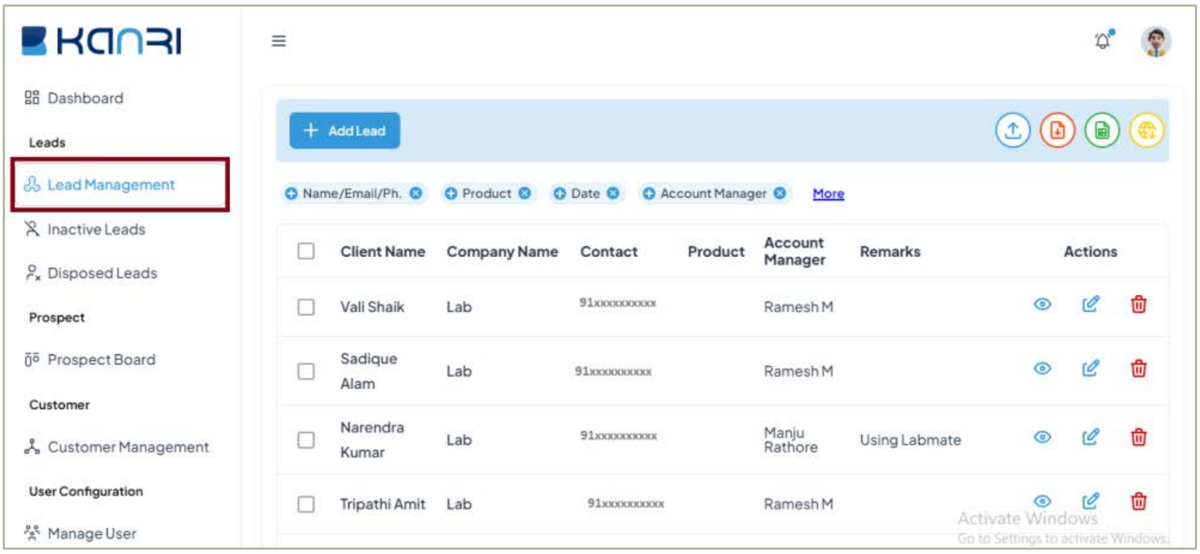
Latest 5 Onboard Business

Name of Company	Account Manager	State	Date of Deal
Safiur R	aanchal	West Bengal	Jan 15, 2024
Pardeep Singh	ramesh M	Haryana	Jan 12, 2024
Mrs. Sampa Bhowmik Saha	ramesh M	West Bengal	Jan 12, 2024
Gopal	ramesh M	West Bengal	Jan 12, 2024
Ataur Rehman	ramesh M	Uttarakhand	Jan 12, 2024

On boarded Business

This section will provide you a glimpse of your latest customers so that you can stay updated on the latest additions to your business and frequency of new conversions.

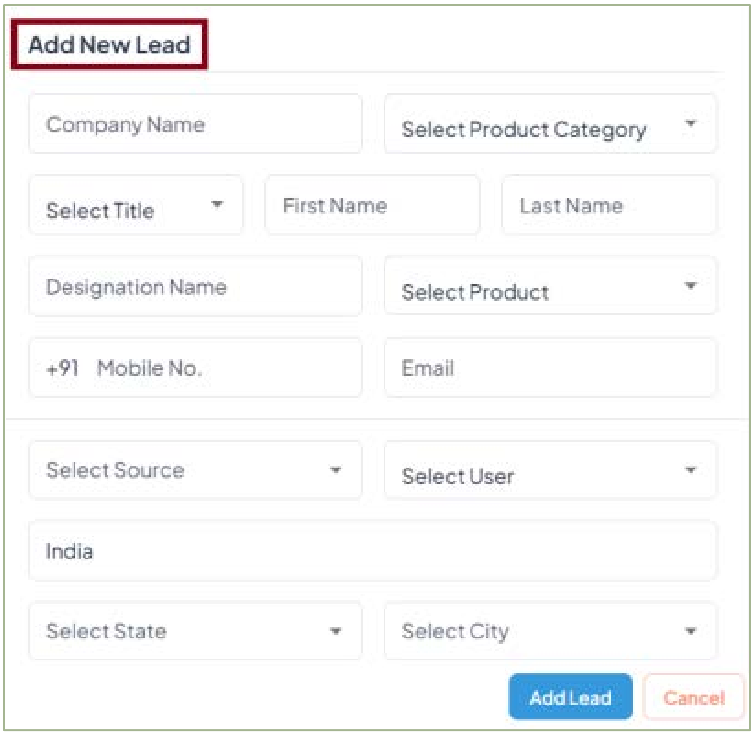
- **Lead Management :**



Lead Management

The Lead management section enables manager to create lead inside the System it can be done manually as well as Excel imports once lead is created in system it can be easily edited at any stage. Through various filters manager can view lead as per the desired criteria. Let us see how these functions are performed.

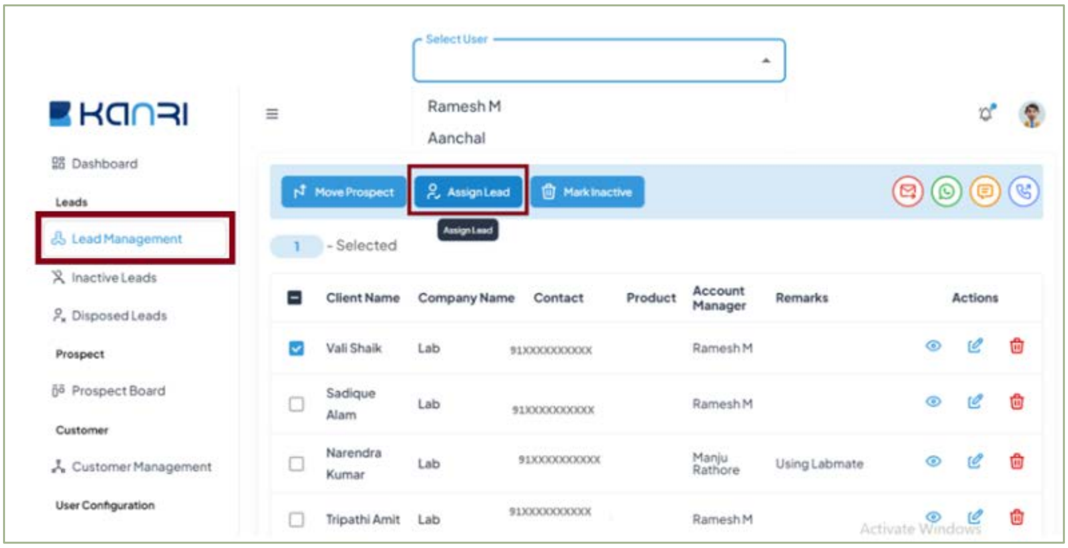
- **Add Lead:**



Add Lead

You can add lead manually through Add lead option or you can upload multiple leads through excel or CSV in predefined downloadable formats. Option of sample CSV download makes the task easier.

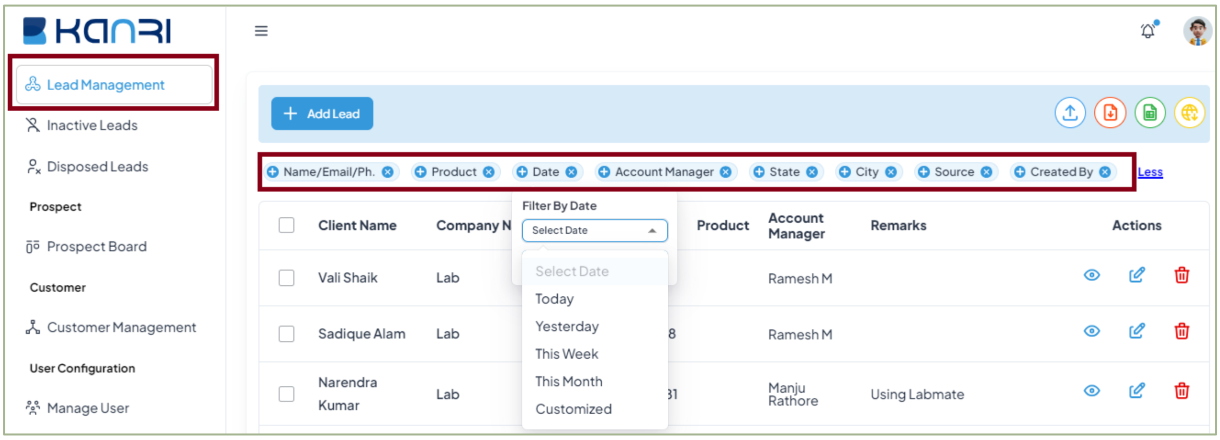
- **Assign Lead**:



Assign Lead

Once lead is created in the system you can assign it to your respective team members in just a single click and they will be called as account managers for that particular lead.

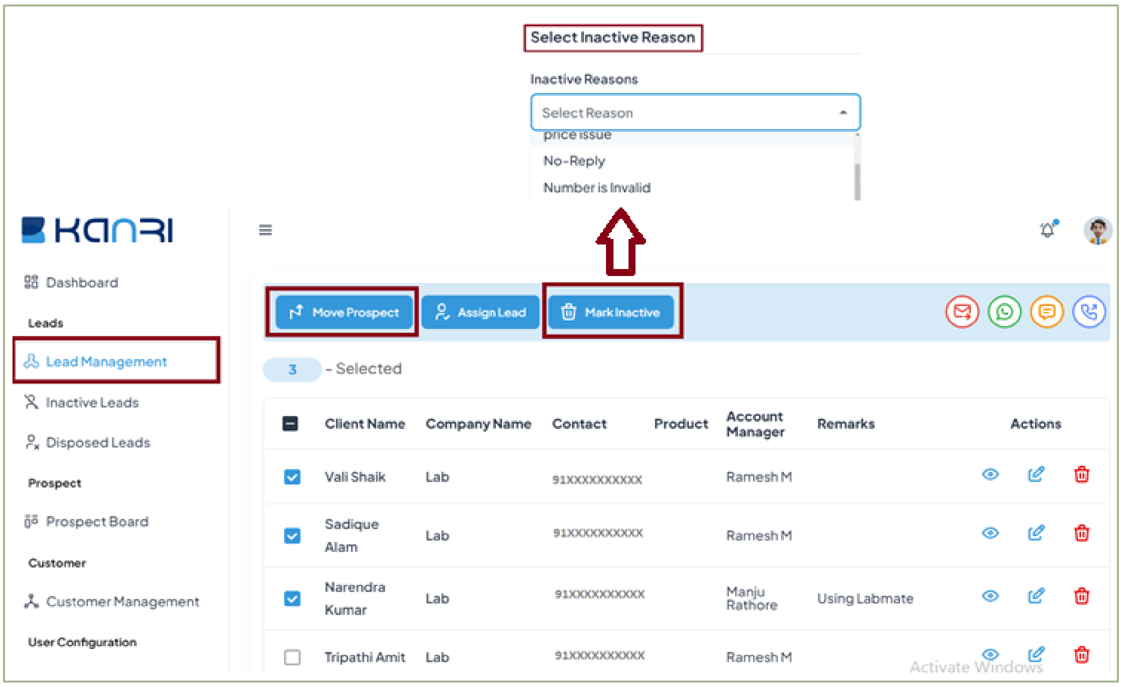
- **Filter's**



Filters

Through varied range of filters you can sort the data on the basis of Products, date, Account managers, Source and can visualize the status of every business lead and can get quick analysis and forecast of the actual situations of business revenues.

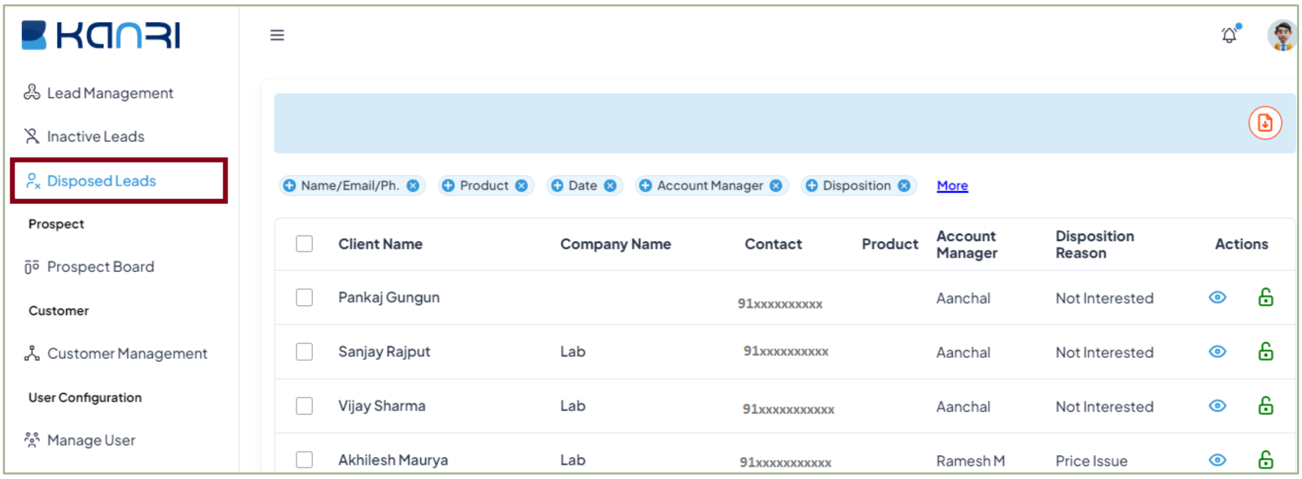
- **Mark Prospect or Inactive:**



Mark Prospect Or Inactive

You can Mark a positive Leads as a prospect by just choosing the option of mark as prospect, or you can mark a Lead Inactive from here if the lead is not interested or negative.

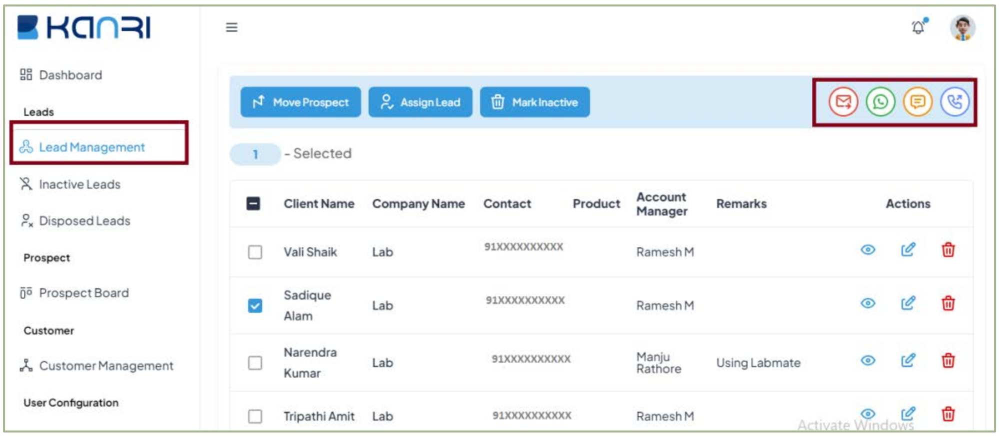
- **Disposed Leads :**



Disposed Leads

If an inquiry or Lead is not moving forward after all the efforts than we can always dispose it for future reference with all the interactions and stages intact.

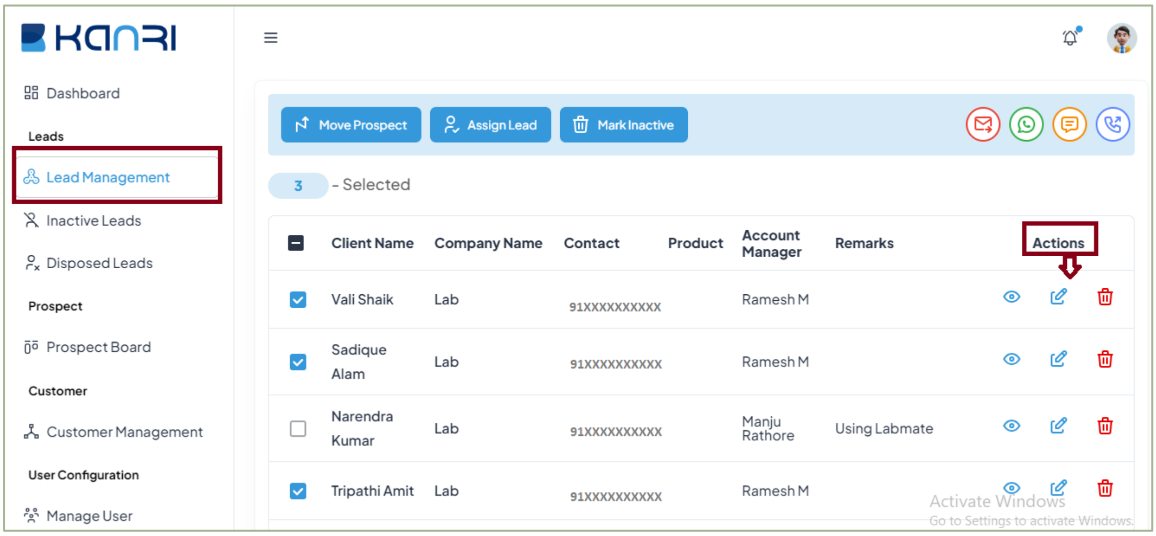
- **Communication**:



Communication

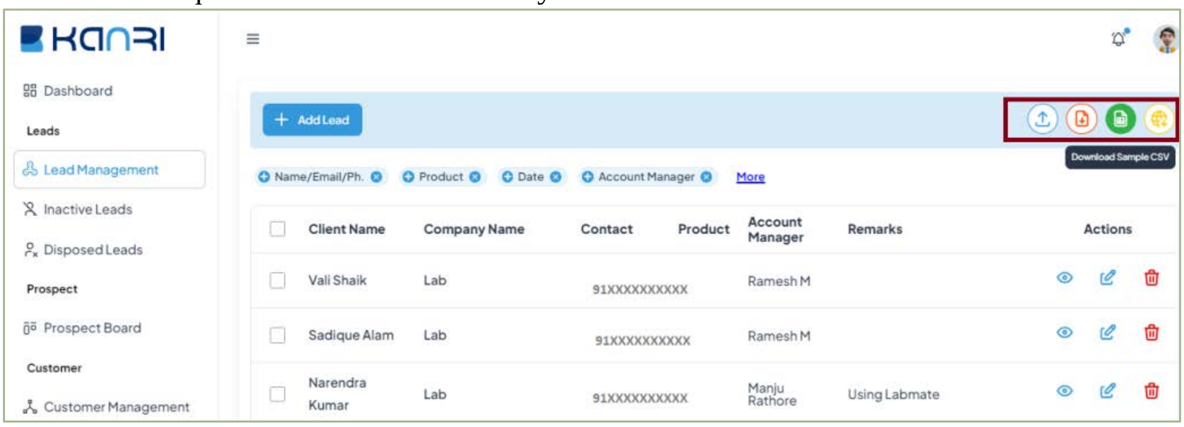
This is one of the most usable feature of CRM where you can communicate with your lead from system itself in form of **SMS's, Whatsapp, Email's, Voice calls** and can save your energy and time in managing multiple platforms of communication.

- **Action buttons**:



Action buttons

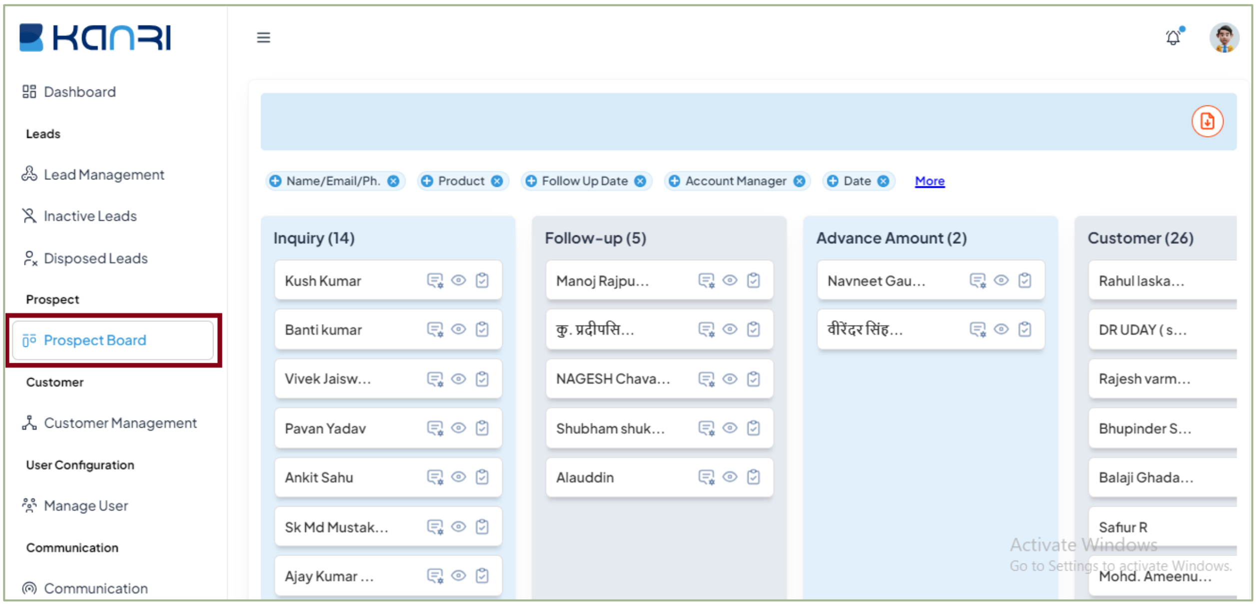
This feature helps you in editing your lead at any stage along with you can view the lead details and even delete if not required further more in the system.



Download File

Kanri provides you with very easy download, upload options at every screen which will help you to generate data and present it in an almost effortless preformatted report.

- ## Prospect Board:

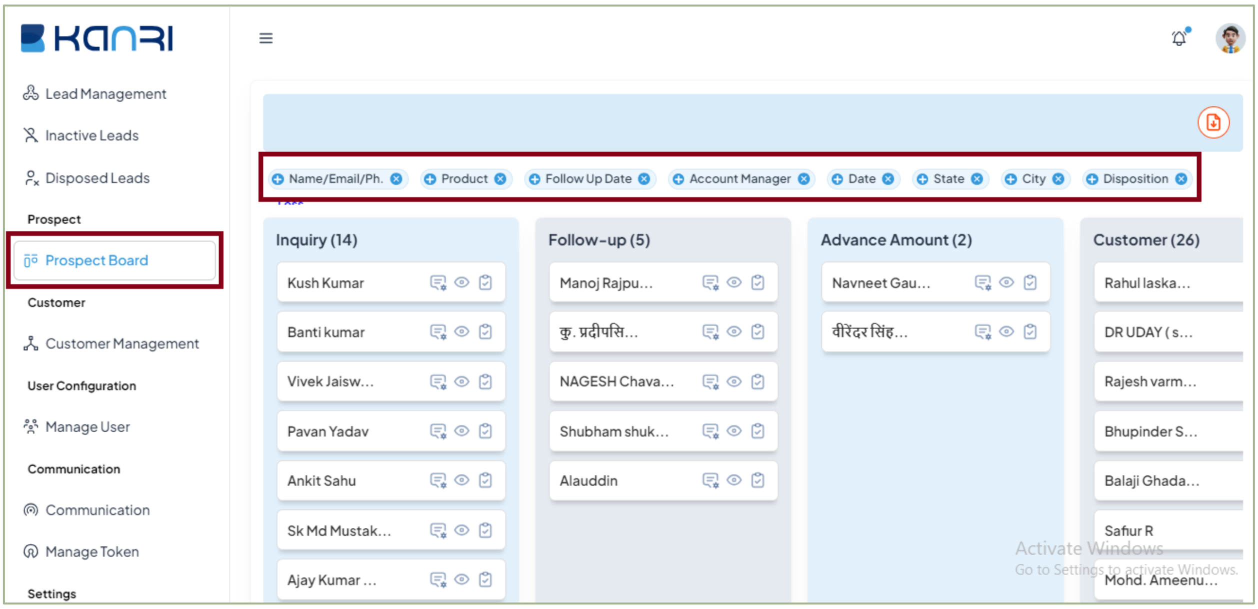


Prospect Board

Kanri will provide you an organized one stop view of your leads and prospects through its Kanban view Prospect board where you can drag and drop leads on the pipeline to move them from a stage to next. In this section of **Kanri** you will get a single eye view of your business and with consistent and reliable follow ups you will never miss an opportunity to seal the deal with your prospect.

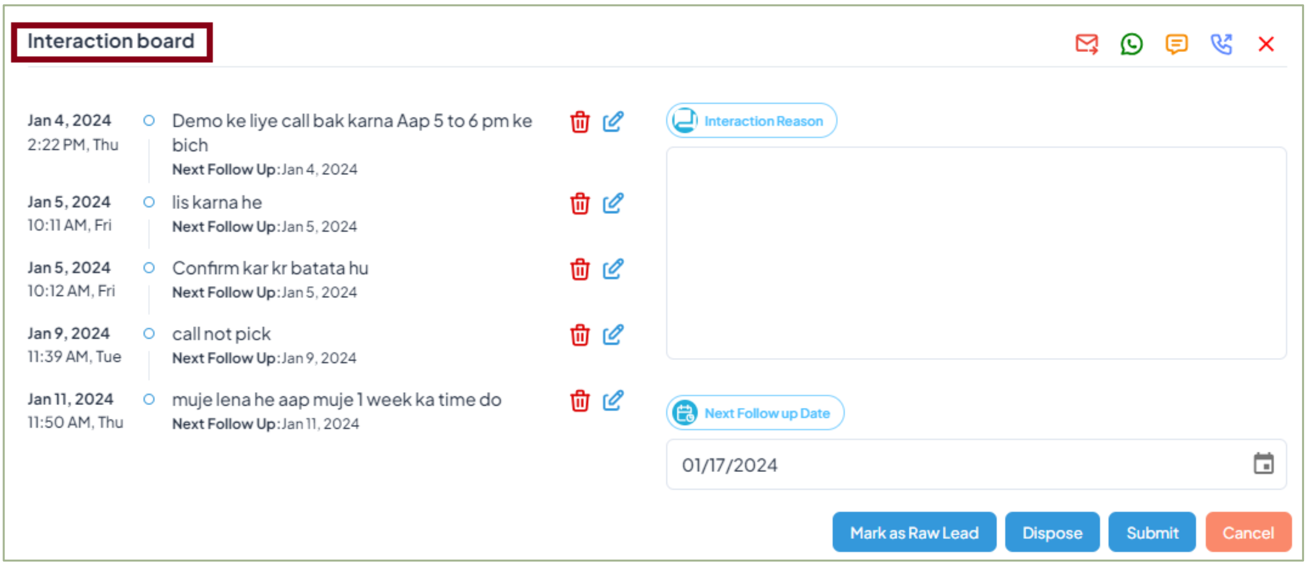
- ## Filters:

Through varied range of filters you can sort the data on the basis of Products, date, Account managers, Source and can visualize the status of every business lead and can get quick analysis and forecast the actual situations of business revenues.



Filter's

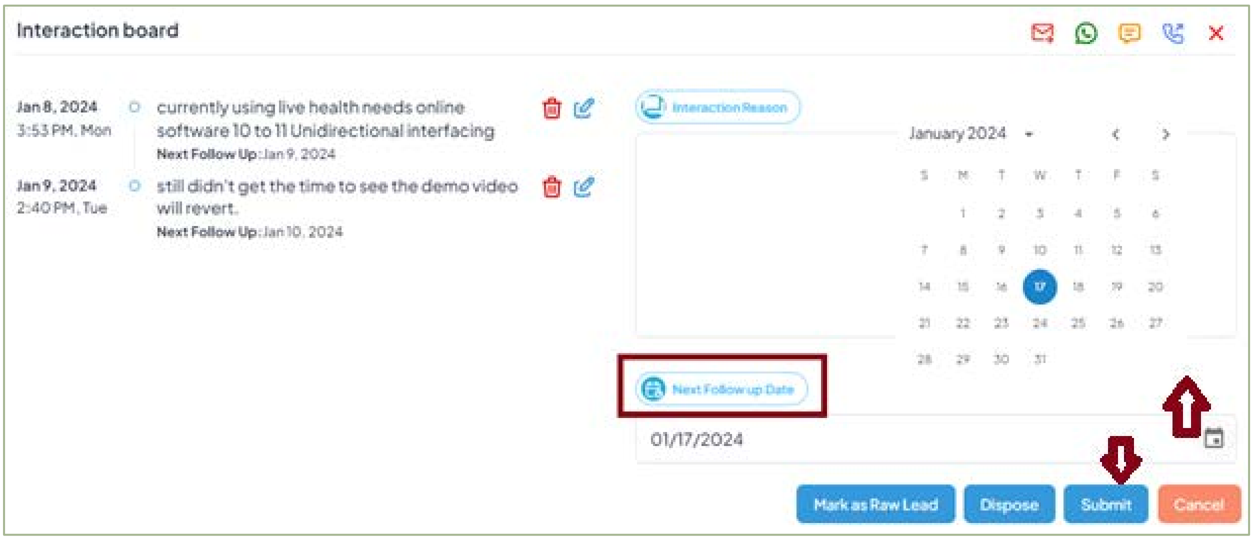
- **Interaction Board:**



Interaction Board

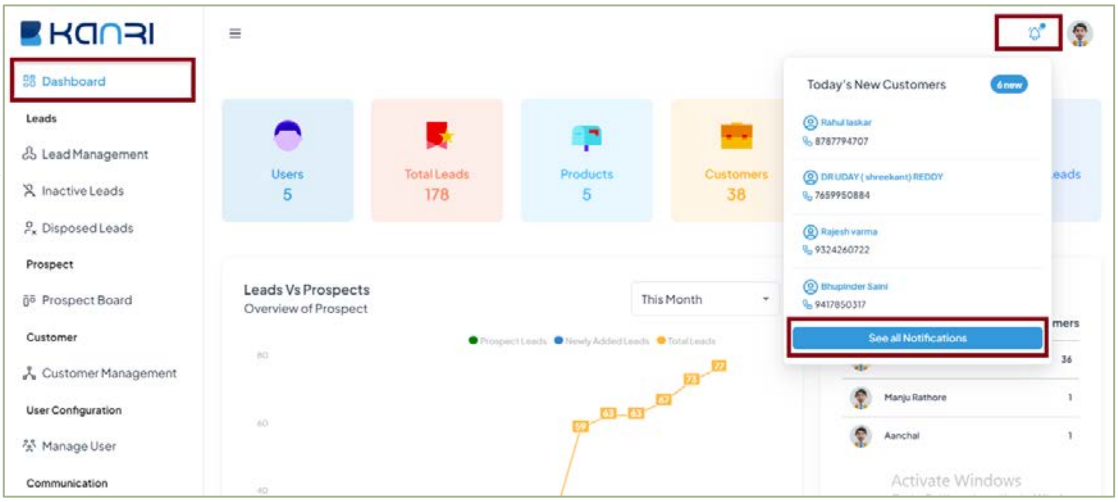
Data written in hand notes and personal computers gets lost so to overcome this problem this feature of **Kanri** will help you store the data at a centralized platform and maintain notes on your Lead and prospects so that with consistent and reliable follow ups you will never miss an opportunity to seal the deal with your prospect. This will give you a Proper timeline of interaction journey which can be evaluated to map the team effort on a lead and can be easily justified through this.

- **Follow-up date:**



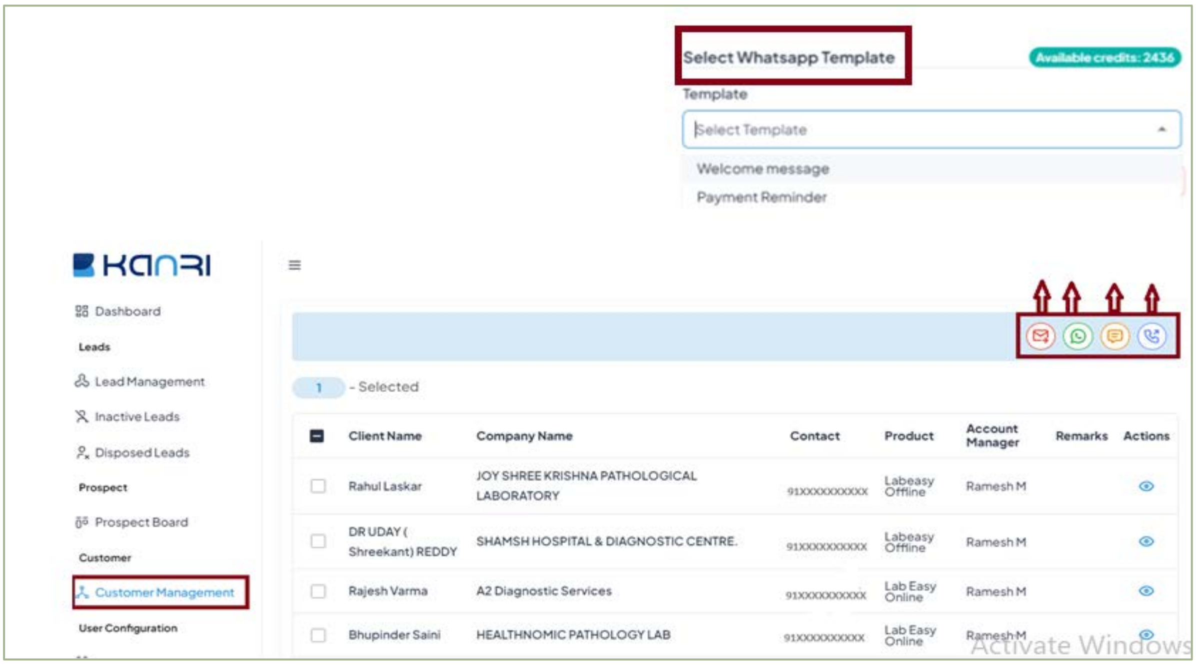
Follow-up date

After entering the interaction choose the follow –up date from the calendar icon below if customer gives you any suitable date for next communication just submit the interaction you will get a **notification** on that selected date at your dashboard notification bell icon so that you never miss any follow-up.



Notification

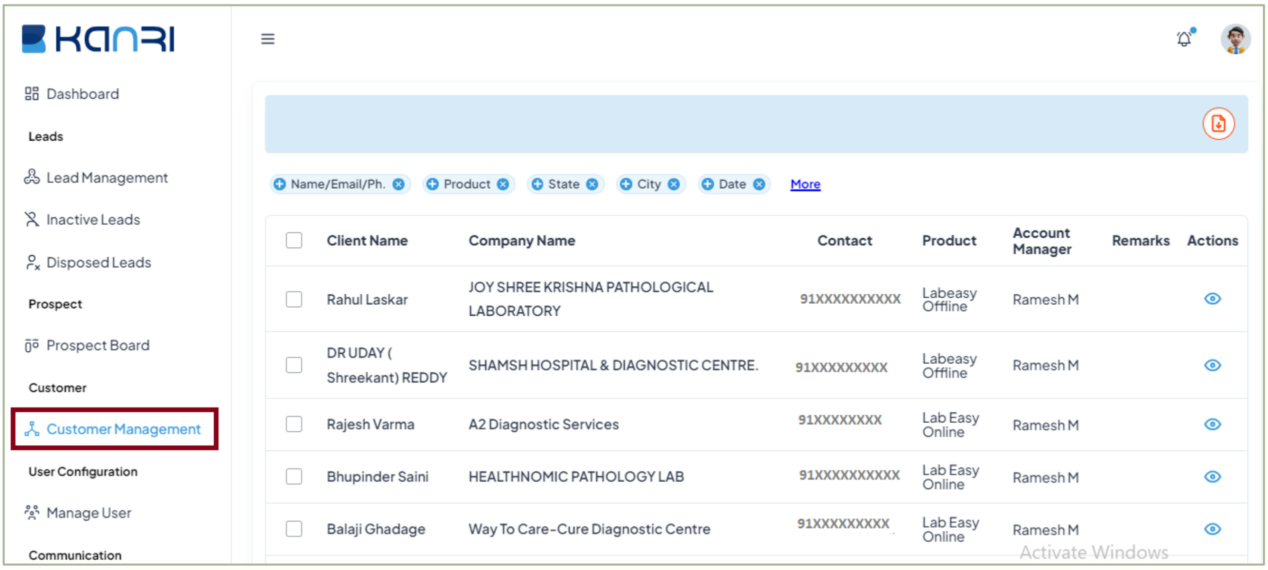
- **Instant Communication**



Instant Communication

Kanri is Telephony Integrated CRM i.e it is enabled with automated communication options like **Text Messages, Emails, WhatsApp and Voice Calls** which will help you to communicate with your customers efficiently at every stage of the business whether it is a lead a prospect or a customer accordingly you can reach to your target audience in seconds and make yourself heard.You can send Festival wishes, Payment reminders, Invoices, Pdf's and many more from a single click to your customers. In this new era of technology **Kanri** is the One-Stop solution for managing your business effortlessly and efficiently.

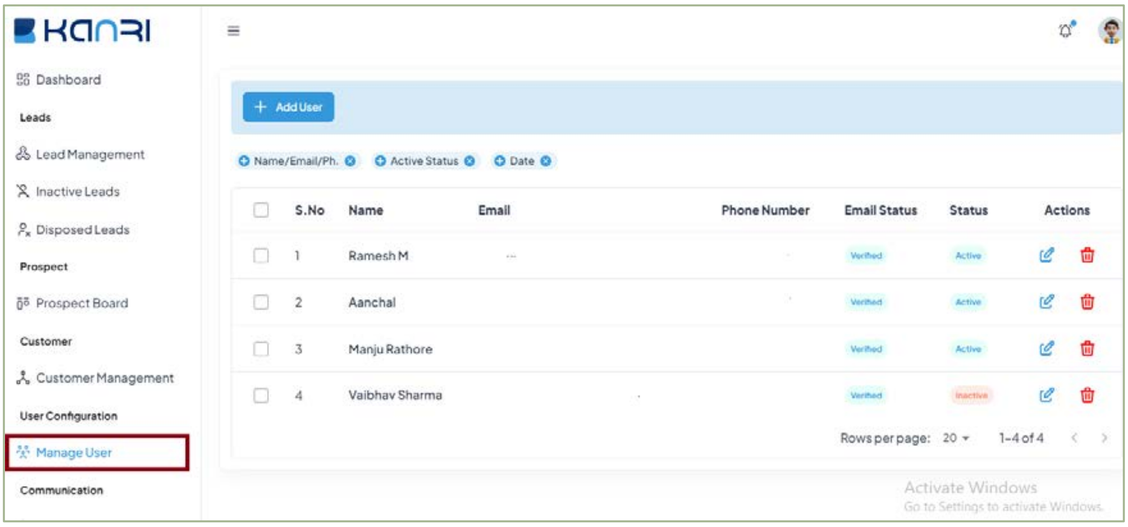
- **Customer Management:**



Customer Management

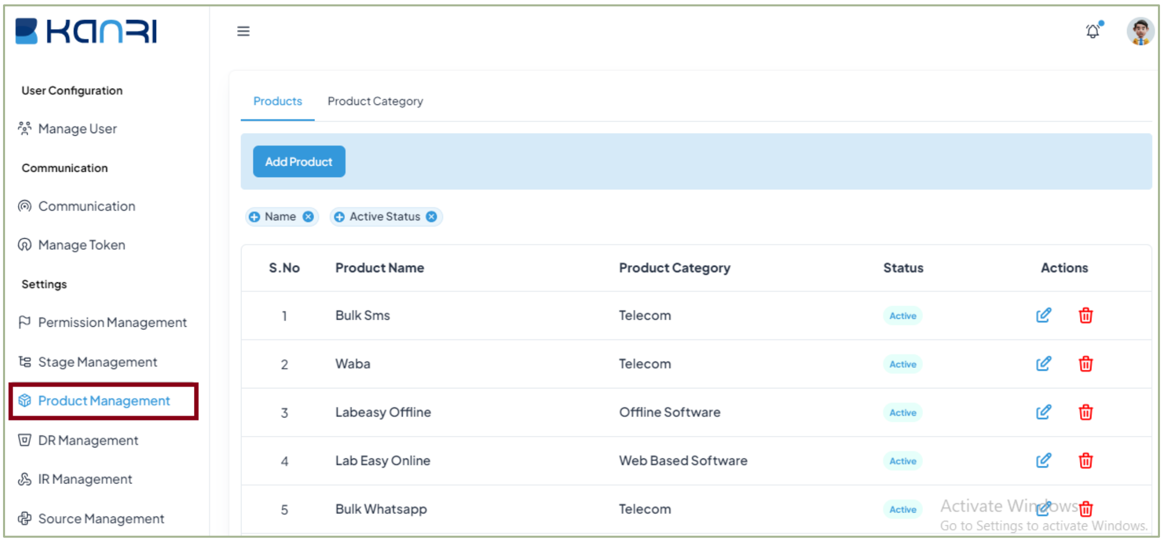
You can view your life time customers on one screen along with their details and filter them with the wide selection of filters provided and send them Messages, Calls, Emails and WhatsApp from the CRM itself and can make them feel prestigious at every moment as required.

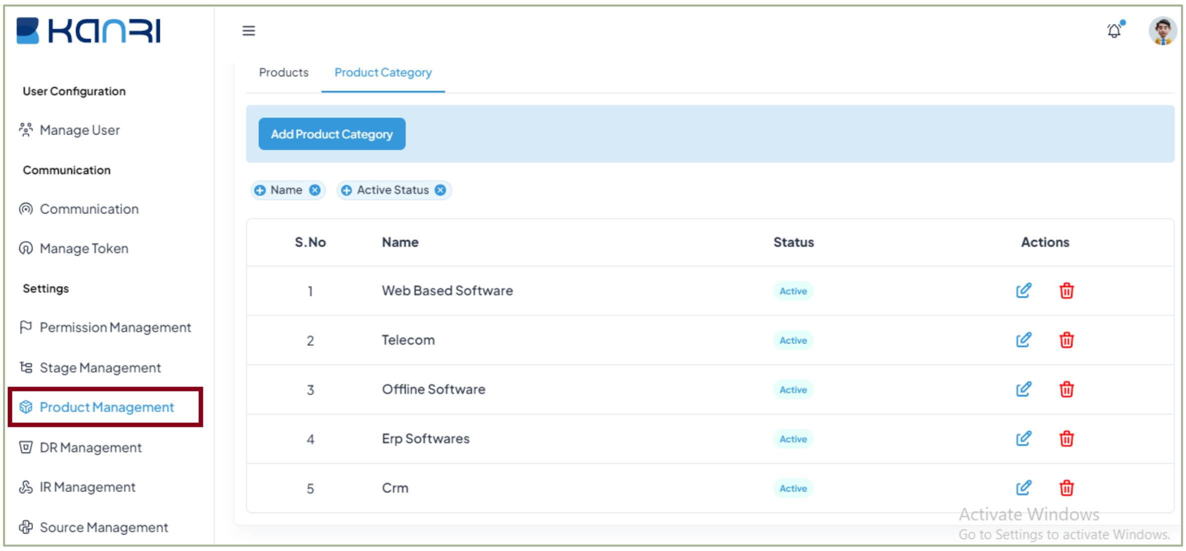
- **User Management :**



A manager can onboard his/her team by using the user management option users can be created in the system and respectively leads will be assigned or transferred to them at any stage. Every user will be logging into the system from their respective id's and can update their respective leads which will be reflected in the admin account.

- **Product Management :**

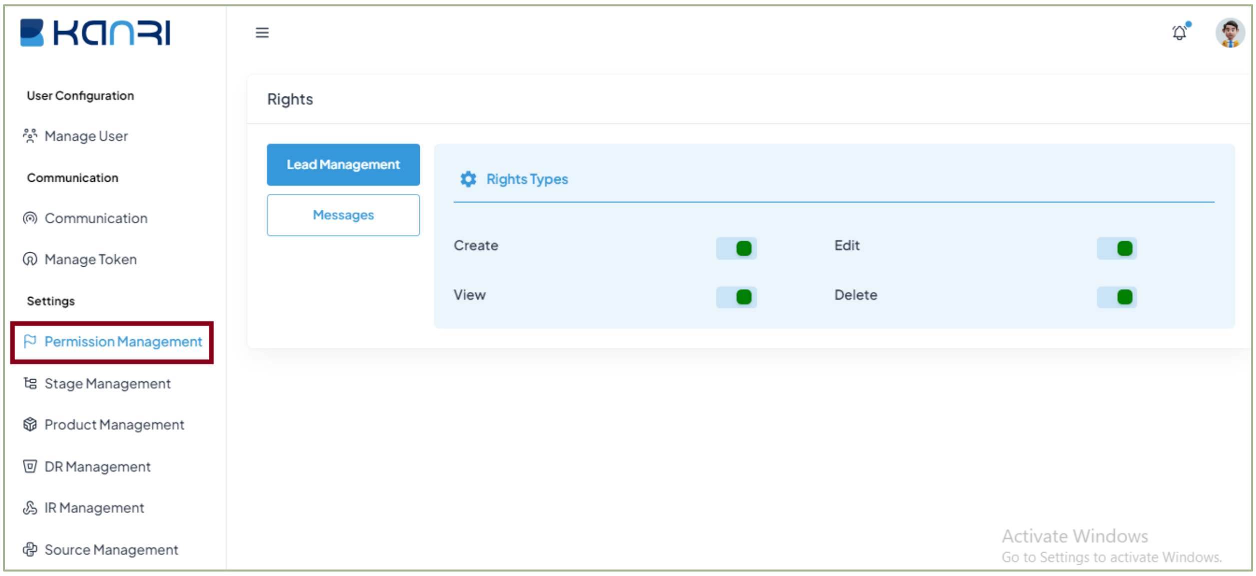




Product Management

In this section you can add products and Product category according to the nature of your business and can select them from drop downs at the time of Lead addition and can also analyze your top selling products of business vs less selling one and can plan strategically and accordingly.

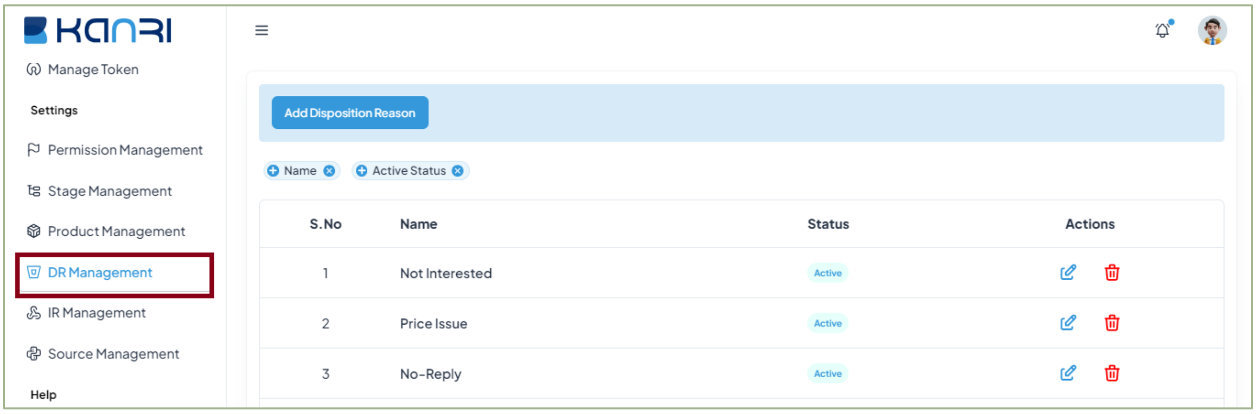
- **Permissions :**



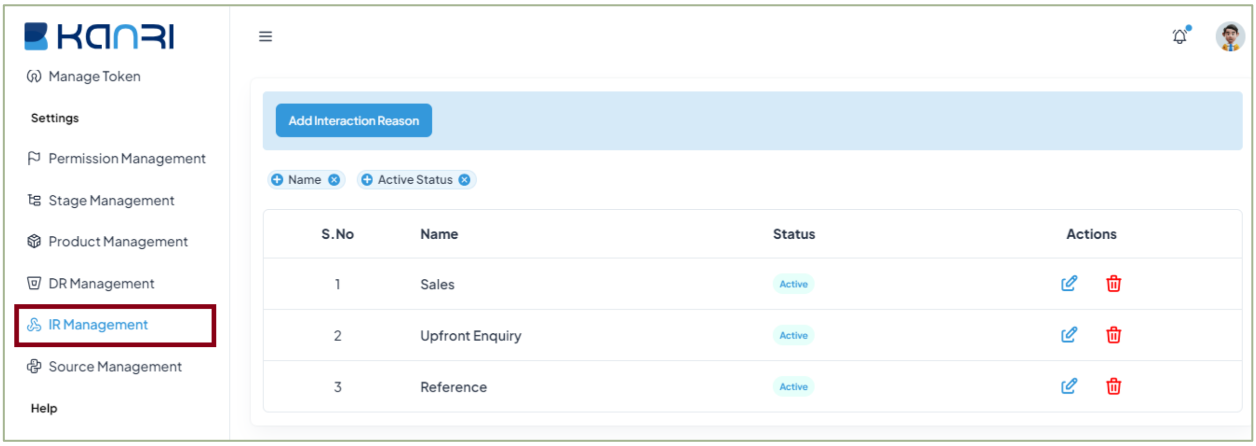
Permissions

This section is exclusively for company admin from where he can manage that what all rights should be allotted to the users in Communication and managing the Lead s for maintaining the confidentiality and privacy.

- **IR & DR Management :**



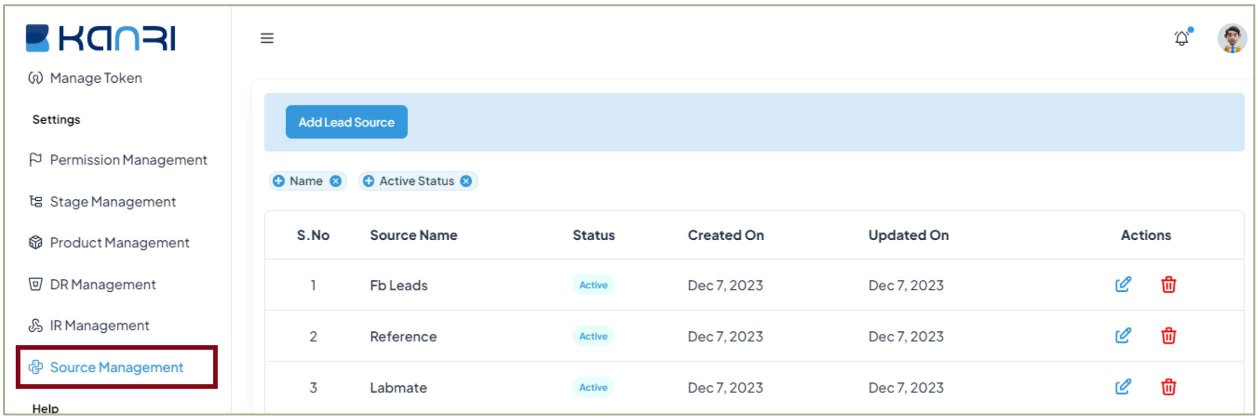
DR Management



IR Management

These sections are for Disposition reasons management and Interaction Reasons management where you can select reasons according to your business and use them in the categorization.

- **SourceManagement**



Source Management

In this section you can add the lead source from where you are importing your leads for business like social media, paid campaigns etc

- **Stage management :**

Stage management

You can create stages according to your business and can arrange your Leads in them so that the conversion and follow –up becomes easy with the demarcation and you can monitor your entire business leads conversion status effectively.

- **Help and Support:**

Support	Address of communication
Email:support@bizkanri.com	**Head Office:** Jaipur: R-269 Frontier colony,Jaipur (302001), Rajasthan, India
Chat: +918386881188	**Branch Office:** Udaipur:D-276 Sector no 14,Udaipur (313001), Rajasthan, India.
Schedule Call: +918386880388	