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FULCRUM - COMPLETE SALES FORCE AUTOMATION TOOL

The Customer Has Inquired, Now What?

Online inquiries lead to sales, which in turn bring in revenue, the ultimate goal of any commercial organization. Online marketers therefore apply all their energy just to ensure that their website visitors somehow click on 'Contact Us Button'. But, is that the end of the whole process?

No, it's not. There's a lot more that needs to be done to ensure that no inquiry falls though the sales pipeline and is converted by your sales team.

Why Do You Need a Tool for Sales Automation?

Once you get a sales inquiry, it's either closed or not, so why do I need a tool to automate this simple sales process?

If you have similar concerns, you are definitely missing out numerous leads that can turn into customers. A sales automation tool, not only takes care of the closed and open inquiries, but does much more than that.

It manages the entire sales lifecycle, creates user views, documents conversations, manages relevant files; creates tasks and reports, as well as record billing details. Sales automation tool become even more important if your business receives substantial online traffic that accounts for major portion of your revenue.

What Is Fulcrum?

Fulcrum is a complete sales automation tool created by Flatworld Solutions that streamlines sales and inquiry processes. It is an easy-to-use web interface that provides multiple workflow and user management features and can be seamlessly plugged into the 'Contact Us Form' of your website.

Fulcrum creates a follow-up procedure to segregate inquiries based on their interest level, nurture valid inquiries and help them move through the end of the sales funnel.

Specifically, Fulcrum helps you achieve the following:

1. **Dashboard**
   As soon as you login to the Fulcrum, a dashboard welcomes you with all the numbers important for your sales team. It provides a bird's eye view of the inquiry status, conversions and closures.

2. **Management of Inquiry Lifecycle**
   Fulcrum helps you maintain information about an inquiry from the time it was generated till it's closed or discarded. Additionally, our software provides:
   - **Multiple ways to add inquiry:** You may add an inquiry onto Fulcrum through Email, Website Capture or Cold Calling
   - **Inquiry Classification:** The tool allows you to categorize inquiries based on their sales readiness. So, you can classify inquiries as Open, Pre-qualified, Qualified, Closed or any other classification apt for your business
   - **Create logs for all activities on inquiries:** You can create inquiry-specific-logs to keep a track of the activities done for a particular inquiry. So, you can account the number of calls made, emails shared, topics discussed or whatever information seems necessary to be recorded for a particular inquiry
   - **Create flags:** You can create flags like 'important, Passable, High Priority' etc. and assign those to your inquiries to identify their level of priority and importance
   - **File management:** If there are any inquiry specific files, it can be managed using this application
   - **Change status of an inquiry:** It allows you to create and alter the status of any inquiry

3. **View Management**
   Fulcrum allows user specific view management feature by creating filters. Administrator has the privilege to create users and views, and save them. Views are created specific to individual user's roles.

4. **Project Creation**
   It allows users to create a project for inquiries. However, project can be created only if an inquiry is closed.

5. **Task creation**
   There can be several marketing or sales related tasks that you wish to do for an inquiry, like sending SMS, Email, Reminders or updating information on Browsers or Outlook. All this and more can be achieved with task creation.

6. **Report Creation**
   Fulcrum allows you to create standard as well as tailor-made reports. So, you can:
   - Create customized reports
   - Select / add / remove columns or rows
   - Create custom conditions
   - Order / Sort / Filter reports
   - Share them or Save them onto any desired platform

7. **Billing**
   This tool further allows you to keep a track of the billing details corresponding to all inquiries. It keeps a check on the collection due date, amount, and mode of payment, and can also receive payment. Additionally, with this tool you can maintain different billing formats for different payment modes:
   - FTE (Full-Time-Equivalent)
   - Monthly Payment
   - Per Hour Billing
   - Transaction-Based payment
   - Fixed Billing

Redefining Sales Roles, Blurring the Lines between Sales and Marketing

With tools like Fulcrum in market, the boundaries between sales are marketing are gradually diminishing, as it largely combines them into a cohesive unit. Fulcrum is the only sales automation tool that offers end-to-end capabilities, be it -

+ Tracking inquiry life cycle
+ Managing sales pipeline
+ Acting as an interface between buyers and sellers
+ Recording logs and communication data
+ Creating reports as well as projects, or
+ Maintaining billing information

Why Only Fulcrum for Sales Automation?

+ **Seamless Website Integration:** Fulcrum can be seamlessly integrated to your website's 'Contact Us form(s)' to automatically capture all the inquiries that come through those forms. It will store complete inquirer (lead) data, in a searchable and fully indexed format enabling ease of access and modification.

+ **Scalable User Management:** Fulcrum takes care of data access, security and authorization by providing user management features. Based on their roles or functions within the sales team, users can be granted access and authorization levels. Additionally, it authorizes managers and administrators to monitor task status and performance at user level.

  Further, Fulcrum is the only tool that accounts "Partners"; roles that support primary sales team throughout the entire sales cycle despite being external to the sales team. It allows users to record communication with partners as well.

+ **Inquiry Administration:** It administers and routes web-based inquiries through designated action points (managers/site admins) for approval. It allows users to store, assign, qualify, reject, and process inquiries seamlessly.

+ **Workflow Recording:** MS Outlook-based communication with customers when routed through Fulcrum can be recorded for future reference and compliance. Thus, each and every communication with customers whether in or out of the team, can be logged and recorded for reference using Fulcrum.

+ **Analytics and Reporting:** Fulcrum provides users the flexibility to create multi-faceted reports. So, you can create customized reports of the performance of your sales team, open and closed inquiries, conversion ratios, and so on. Moreover, these reports are robust and allow users to perform comparisons and analytics and analyze trends.

Do You Own Fulcrum Yet?

Fulcrum has been designed to help you manage your inquiries in most seamless manner, so that you are never short of hitting your sales numbers. Additionally, we offer a state-of-the-art software product known as 'Fulcrum Invoices' which can be easily integrated with Fulcrum SFA. If you want to improve the performance of your sales division, and ensure that inquiries don't leak through your sales funnel, Fulcrum is the product you want for your organization.

Talk to our team today and never miss an inquiry again!