

**Example System** – A bespoke Web based CRM (Customer Relationship Management) System for an electrical business to manage its customers, quotes, jobs and invoicing

A system like this would require:

**Secure Login** – this would include two-layer authentication for maximum security.

**Dashboard** – this will allow the system users to see key information. This might include the latest leads, current quotes, overdue invoices - essentially all pertinent information the business needs to run the business efficiently.

**Leads** – this would allow the business to manage leads generated from the website, including text, phone call or verbal, ensuring all recorded information is centralised in one place. As the system can proactively alert the business if any leads are yet to be acted on, this also ensures that no leads are lost, and all are followed up in a timely manner.

**Quotes** – this will allow the business to generate professional PDF quotes using pricing data, held either in the system or integrated with an accounting package. The professional quote could then be emailed directly from the system, allowing easy management of conversion rates and enabling the customer to accept the quote through a link.

**Job Management** – this will allow the business to move each job through the system, from quote acceptance and job management through to completion and invoicing.

**Invoicing** – this will allow the business to automatically create professional invoices or integrate with an accounting package to create and send. This area could also follow up on unpaid invoices and proactively alert the business so they can intervene if necessary.

**Customer Management** – this will allow the business to manage all customer information, from contact details, leads and quotes to jobs, total spend, profit margins and conversion rate percentage.

**Reports** – all valuable data captured from the point of enquiry can be used to provide real-time data on things like:

- the conversion rate % of each job, how many are being won, lost etc.
- the likelihood of a job being won
- the profit made on each job
- the value of all quotes split by status e.g. (won, open, lost)

This level of real-time business data is invaluable, empowering you to make the correct business decisions. It also provides critical insight into other areas, including the likelihood of a quote being accepted, before you begin investing your time and effort.

**User Management** – this will allow the business to add/edit and delete user access to the system, giving them full control.

**Configuration** – this will allow the business to add/edit and delete dropdown values in the system. This is useful for things like quotes - if the information used to populate the quote isn't coming from a third party, it needs to be accessible to change.



**Other project costs** – with each project, we factor in costs for a needs analysis session, specification writing, project management and testing – these costs are generally proportionate to the overall project size, and a needs analysis session is only needed if you haven't already started scoping your project out.

**No hidden costs** – if you've paid for us to develop your software, you'll find you won't need to pay a license cost per user - all Sapere, solutions are unrestricted, so you can add as many users as you'd like without incurring additional costs.

**Running costs** – web applications need to be hosted on an appropriate web-based server, with all data encrypted using a TLS/SSL certificate. In this example, the costs would be around **£110** per month, but costs do vary depending on the solution required.

A system such as this would cost around **£18 – £24k**, depending on the level of integration with third party solutions.

This is a great example if you want a rough idea of costs. If you'd like to chat through your own project in detail, please just get in touch with a member of our Sapere team – we're jargon free and here to help.

Email: [sales@sapere.co.uk](mailto:sales@sapere.co.uk) | Telephone: (01642) 955645