

# Pothera CRM

Make Your Customers,  
Your Brand Ambassadors



**Transform Every  
Interaction into Opportunity**

**Boost Engagement,  
Increase Efficiency, and Drive Sales.**

**Pothera CRM**

# Pothera CRM

## GAIN A 360° CONTROL OVER YOUR BUSINESS, CUSTOMERS & OPERATIONS.

Pothera CRM helps you thrive in competitive markets by facilitating the process of customer acquisition and retention. It fosters meaningful and consistent customer engagement, which plays a crucial role in purchasing decisions and overall satisfaction.

Pothera CRM **streamlines** and **optimizes customer-centric processes**, **demolishing departmental silos** and **ensuring smooth flow** of information, across the organisation.



**With features like mobile workforce support, seamless integration with various enterprise applications, adaptability to changing business needs, and the ability to overcome rigid structural barriers, Pothera CRM augments your operating efficiency quotient and drives all-round growth.**



## DRIVE GROWTH AND IMPROVE OVERALL CRM PRODUCTIVITY

Streamline your customer management operations, improve the quality and quantum of engagement, and empower your sales team to create superlative customer experiences, with the unmatched advantage of Pothera CRM.



## CENTRALIZED CUSTOMER DATA MANAGEMENT

Pothera CRM centralizes and consolidates all customer information on a single platform, promoting interdepartmental collaboration and productivity. You can access, manage and update customer data in real time to enable better and more informed decision-making.



## ENHANCED CUSTOMER ENGAGEMENT

It allows you to custom tailor your customer communication and personalize the customer experience. Targeted campaigns and proactive responsiveness result in enhanced customer satisfaction and stronger relationships.



## STREAMLINED SALES PROCESSES

It automates your sales pipeline from lead prospecting to final conversions, enabling improved and efficient sales operations, leading to increased revenue potential for your business.



## ADVANCED ANALYTICS AND REPORTING

It generates actionable insights with robust analytics and reporting tools. You can track performances, forecast demand and make data-driven decisions to improve the way customers respond to your business.



## SCALABLE AND CUSTOMIZABLE SOLUTION

It customizes and scales up alongside your business as it grows, adapting to your needs and preferences, without disrupting day to day operations or any other modality of your business.



## COST EFFECTIVE SOLUTION

It streamlines operations, enhances customer satisfaction, and drives sales growth, by centralizing data and automating processes, translating into a low cost of ownership and a high return on investment.

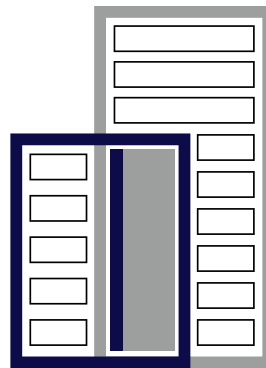
# Pothera CRM

EVOLVES TO SUIT YOUR NEED:  
FOR YOUR BUSINESS TODAY AND FOREVER.

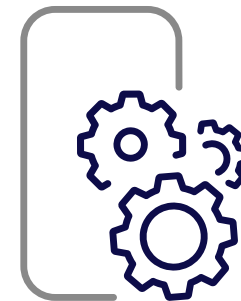
Explore our cloud based, on-premise or mobile options and equip your maintenance strategy with the Pothera CRM advantage.



Cloud-based



On Premises



Mobile Options



# KEY FEATURES OF PRE SALE **Pothera CRM**



## KEY FEATURES OF PRE SALE POTHERA CRM



### **LEAD GENERATION**

Pothera CRM maximizes business growth by automating lead capture from websites, social media and other diverse sources. It assesses and categorizes the true potential and worth of the lead, with features like demographic profiling and behaviour patterns.



### **ADVANCE WEEKLY PLANNER**

It is an integrated business intelligence to help plan and schedule your sales activity calendar, well in advance. View and manage sales team calendars, as each team member is assigned tasks and appointments, with specific goals and targets.



### **ORDER MANAGEMENT**

It enables you to seamlessly manage and monitor customer orders from inception to fulfilment. You do not have to manually follow the order, as Pothera CRM automates order processing and invoicing, while setting up reminders and notifications for follow-ups.



## KEY FEATURES OF PRE SALE



### **TARGETS AND PROJECTION**

It enables you to access relevant historical sales data and analytics to set practical sales targets and projections for individuals and teams. Conveniently integrate with the sales dashboard, to observe market trends, customer behaviour and track performance and progress towards targets, to fix issues and adjust strategies.



### **SALES DASHBOARD**

It is the ready answer for driving continuous growth with real-time sales data and analytics. You can track sales performance across teams and individuals, monitor sales pipeline and conversion rates, identify trends and patterns in sales data and more.



### **360° CUSTOMER VIEW**

It covers each and every touchpoint across customer interactions and history. It analyses customer feedback and psychographics to track customer preferences and behaviour, so you have your finger on the pulse of the market.

## KEY FEATURES OF PRE SALE



### **ACTIVITY MANAGEMENT**

Activity management is an integrated value addition on the sales dashboard, as it enables real-time tracking and analysing for more informed decision-making. It lets you track and manage important calls, meetings and other such sales team activities.



### **SMS AND EMAIL NOTIFICATION**

Send automated SMS and email notifications to customers to update them on order status, service reminders, or follow-up calls.



### **CUSTOMIZED REPORTS**

Generate customized sales reports and analytics to develop intuitive insights into sales trends, team performance, and customer behaviour.

A photograph of two men in business suits sitting at a desk. The man on the left wears glasses and is looking at a tablet. The man on the right is smiling and pointing at the tablet with a pen. On the desk, there is a laptop, a glass of water, and some papers with charts. The background is a bright window with a city view.

# KEY FEATURES OF POST SALE **Pothera CRM**

# KEY FEATURES OF POST SALE



## COMPLAINT MANAGEMENT

It facilitates seamless issue resolution by allowing you to monitor and manage customer complaints and issues. It offers an automated process to assign complaints to sales teams for resolution, set reminders and notifications for complaint follow-ups and analyse complaint trends to formulate or adjust strategies.



## INSTALLATION MANAGEMENT

It integrates installation management with other CRM features for seamless service delivery. It allows you to assign installations to the sales team for completion, set reminders and notifications for installation follow-ups and track and manage product installations and services with the help of comprehensive installation history and customer interactions.



## WARRANTY MANAGEMENT

It maximizes overall CRM productivity with seamless warranty management. You can proactively track, manage and resolve product warranties and claims. You can also delegate warranties to the sales team for perusal and set reminders and notifications for warranty expiration dates.

## KEY FEATURES OF POST SALE



### **SPARE PART CONSUMPTION**

It helps you manage your spare part consumption efficiently. Pothera CRM automates the spare parts consumption control process and enables you to provide timely support and minimize delays, to keep customers satisfied.



### **SERVICE QUOTATION**

Ensure prompt and accurate customer quotes with Pothera CRM's service quotation feature. You can streamline your quote generation process, and address customer issues by offering need-specific, personalized service, to improve conversion rates and improve client satisfaction with inspiring professional proposals.



### **AMC / CMC MANAGEMENT**

This feature helps you track and manage Annual Maintenance Contracts (AMC) and Comprehensive Maintenance Contracts (CMC), to ensure timely renewals and maintenance scheduling, resulting in proactive support by service teams.

## KEY FEATURES OF POST SALE



### **PREVENTIVE MAINTENANCE MANAGEMENT**

Ensure seamless preventive schedule maintenance with Pothera CRM. You can track and manage maintenance operations to execute maintenance activities before any critical issue arises.



### **COMPLAINT ALLOCATION**

It ensures that customer complaints are assigned to the relevant teams in real-time. It is designed to find the best personnel to match the degree of complexity of the complaint. This results in speedy resolution of complaints and enhanced customer satisfaction.



### **REPAIR CENTRE MANAGEMENT**

It enables you to track and manage repair centre activities. This feature ensures a seamless service delivery in the repair centre, by cutting down turnaround time, and updating customers with real-time notifications, leading to better and smoother workflow.

# KEY FEATURES OF POST SALE



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# Pothera CRM ADVANTAGE

An ideal solution that's better, different and miles ahead of the competition.

|  |  |   |
|--|--|---|
| 1 One Stop IT Solutions                | 2 Document Attachment in multiple formats        | 3 Flexible and easily scalable          |
| 4 Preconfigured Enterprise Application | 5 Fully Paperless System                         | 6 Powerful and granular authorization   |
| 7 Multi-currency support               | 8 E-mail and WhatsApp Integration                | 9 Automated E-Invoicing API integration |
| 10 Quality Management                  | 11 Connect multiple plants and companies         | 12 UDF (User Define Field)              |
| 13 Integrated Business Intelligence.   | 14 QR Code & Digital Signature (API Integration) | 15 Sub-Contracting                      |

## BUSINESS BENEFITS: KEEPING YOU AHEAD

### DATA-DRIVEN DECISION MAKING

In-depth data analysis and reporting, enabling informed decision-making and optimal sales strategies.

### EXCEPTIONAL CUSTOMER SERVICE

Streamlined customer interactions, enabling efficient issue resolution, enhanced service quality and improved customer satisfaction.

### CONTINUOUS GROWTH

New prospects identification and engagement, leads and opportunity tracking to drive continuous business growth.

### FASTER DEAL CLOSURES

Real-time data and automation tools to empower your sales team.

### TARGETED SALES

Makes cross-selling and up-selling easier and more targeted, by identifying customer preferences.

### CENTRALIZED CUSTOMER DATABASE

Real-time access to essential customer information, through a unified database.

### REVENUE BOOST

Actionable customer insights to create targeted strategies, improved customer acquisition and retention, to boost revenue streams.

### VISUALIZE DATA

Intuitive dashboards to visualize data, track key metrics, and gain a 360° view of your business.

## BUSINESS BENEFITS: KEEPING YOU AHEAD

### SEAMLESS COMMUNICATION

Ensure optimized engagement and follow-ups, by efficient tracking and management of prospect communication.

### AUTOMATION AND EFFICIENCY

Automate business processes, minimize manual errors, and save time.

### ACTIONABLE INSIGHTS

Streamline customer communication, build trust and foster long-term loyalty.

### STRONGER CUSTOMER RELATIONSHIPS

Real-time data and automation tools to empower your sales team.

### ANYTIME, ANYWHERE ACCESS

Access vital customer information from remote locations to develop agility and productivity.

### IMPROVED SALES REVENUE

Equip your sales pipeline with qualified leads to increase sales revenue and meet revenue targets.

### BUSINESS GROWTH

Spot new opportunities as they arise, analyze performance metrics, and propel sustained business growth.

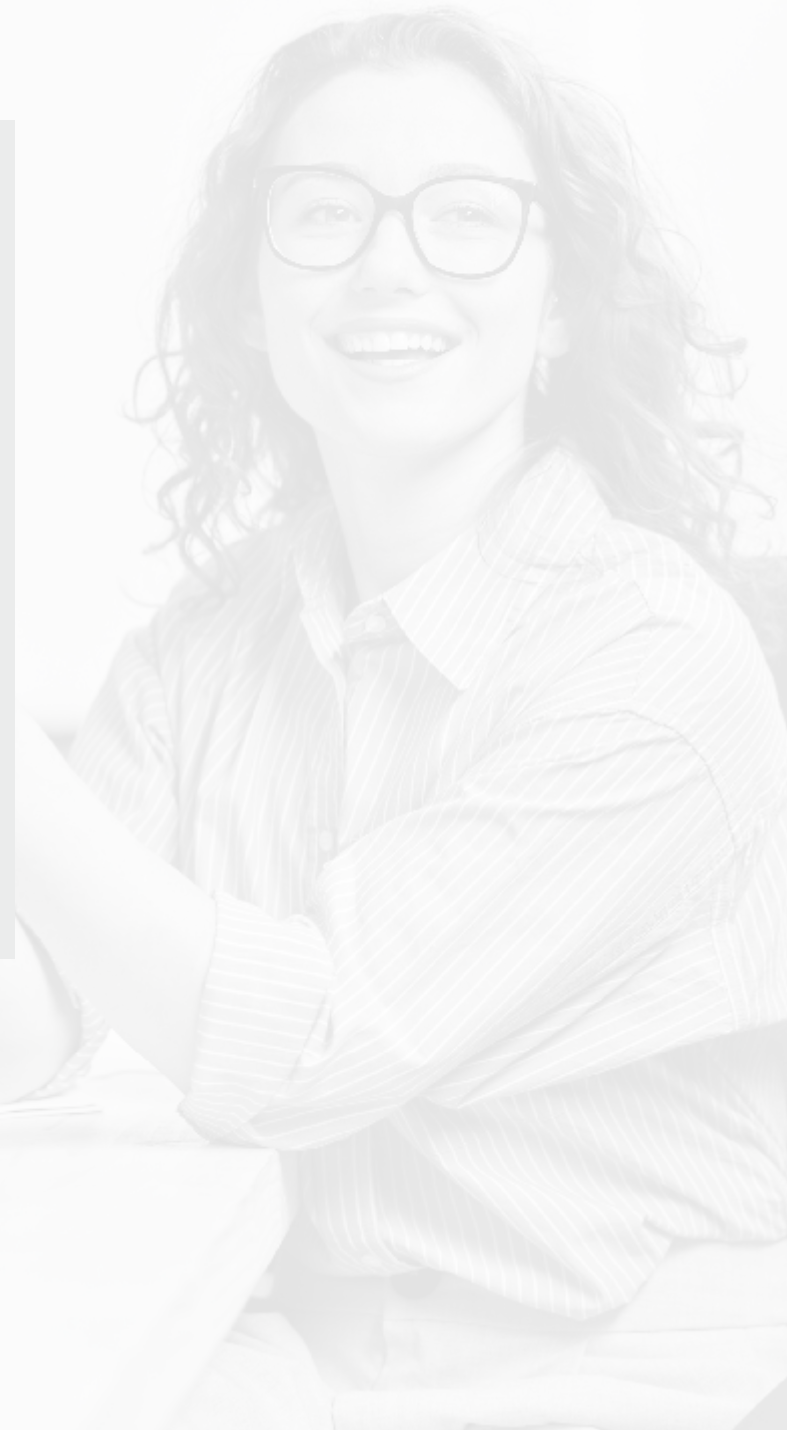
## HAVE A QUERY OR A UNIQUE REQUIREMENT?

We invite you to have a personalized demo, at your place, at your convenience! Experience firsthand how Pothera CRM can transform your business.

Don't miss out on this opportunity to revolutionize your operations and stay ahead of the competition. Reach out to us now and embark on a journey towards greater efficiency, profitability, and success with Pothera CRM.

**Your business deserves to grow!**

**Pothera CRM**



**Pothera CRM**  
IS PRODUCT OF  
**bsquare**<sup>®</sup>  
Let's grow...

Established 20 years ago, B-Square Solutions rose from a regional IT company to a multinational business solutions provider and innovator. With its acclaimed products and services, a strong emphasis on R&D, and a richly experienced workforce, it has today become a leading software development company in India.

- 20+** years of Software Development
- 200+** Projects Completed
- 10K** Dashboard Delivered
- 50+** Domains Served
- 200K+** Hours of Consulting



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