

# Fusio

Company  
Agendas

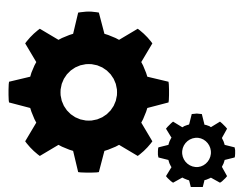
Automate processes in a flexible system



**Support your business and relationships with clients**



**Unify diverse agendas into a flexible system**



**Automate processes and have them under control**



**Reduce the risk of leakage of sensitive business data**



Create a CRM database of clients in your company, oversee business processes and assign tasks easily thanks to linking agendas and automation. Combine company information into one system and control the access to it by assigning user rights.

## Sales manager will appreciate



### EFFECTIVE PROJECT MANAGEMENT



**Look at your subordinates' business cases anytime, introduce measures for improving business processes, communicate with a customer during a sales manager's absence having all the relevant information and combine individual tasks into projects.**



#### **Running a meeting effectively**

*In the past I had a problem to prepare for a meeting properly, because sales managers kept agendas of their cases in Excel or MS Word and sent me reports only a day before the meeting and often with a delay. I lacked updated information and I did not have the chance to be "in the picture".*

#### **Handing information over easily**

*When a sales manager leaves the company, I can hand over his unfinished cases, including a complete history, to his successor or transfer them to other colleagues temporarily.*

#### **Interesting cases under control**

*When a business case with an anticipated turnover of more than 100,000 crowns is started, system Fusio automatically sends information with a direct connection to this case, so I can follow its development.*

David, sales manager



### LEADING A SALES TEAM



**Assign tasks and oversee the quality of their completion.**



#### **A tool for planning of activities**

*Now I can plan business activities for myself and my colleagues easily, set goals and strategies, design a schedule, monitor progress, check completeness of added data, keep track of sources, anticipated profit margins and match hours worked to individual business cases. I have a possibility to follow development of interesting cases and have updated materials available for leading a team.*

#### **Keeping a record of tasks**

*I use Fusio to keep a record of tasks assigned at meetings or outside of them. I have an overview of my and my individual sales representatives' tasks. I combine tasks into projects and I have a tool for their management, I watch completion of*

George, sales manager



### SENSITIVE INFORMATION IS SAFE



**Define access rights and protect company data.**



#### **Controlling access to information**

*Sales representatives in our company have access only to their cases and I can, as a sales director, look at cases of all my subordinates anytime, including attachments, and in this way, I have a possibility to check the progress of a business case or to communicate with a customer effectively when the sales representative is absent.*

#### **Controlled access to contracts**

*We attach contracts to particular business cases and each authorized employee has an immediate access to them. Without a risk of data loss. And our assistant Marie is not unnecessarily burdened by searching for contracts.*

Steven, sales director

## Marketing and sales managers will be excited



### GOOD RELATIONSHIPS WITH CLIENTS



**Build a CRM database and get an overview of your clients' needs, their buying motivation and the level of satisfaction with your services.**



#### Customer service

*Thanks to Fusio I can have an overview of our clients' needs and preferences, what their attitudes to our offers are, what their buying motivation is and what business potential they represent. I can monitor their level of satisfaction and reasons for dissatisfaction and use this information to improve our services. We can look after our best customers individually. We have a plan of marketing activities.*

Jane, marketing director

#### Satisfaction surveys

*Thanks to the unification of our CRM system and the contract register we can use the automation of some processes. For example, after entering a contract with a new client, the system assigns the task of making a phone call to find out the customer satisfaction.*



### AUTOMATION OF PROCESSES



**Unify the whole company agenda into one scalable platform and use the interconnectivity of individual processes.**



#### Information about clients' payment history

*We managed to unify company agendas with accounting software. In this way, our sales representatives, for example, will see a warning if there are invoices over a certain limit after the due date. We gained a tool for controlling our cash flow.*

Joe, financial manager

#### Transfer of paper agendas and agendas from MS Excel and Word Transfer

*We transferred all agendas into Fusio and we use the possibilities of automation and a better access to information. Our sales representatives are given an authorization and then they have an easy access to contracts matched with their business cases and to the client information card with complete data needed for a successful trade negotiation and a customer's satisfaction. As a manager, I am always updated on the development of important cases and I have all the necessary materials for chairing a business meeting.*

David, sales manager

## General service manager will use



### KEEPING A RECORD OF YOUR COMPANY'S ASSETS



**Transfer your paper agendas and all lists kept separately in MS Excel or Word into one scalable platform.**



#### Vehicle fleet

*We transferred all agendas connected to company cars into the system Fusio. Keeping a record of fleet vehicles includes checking the validity of vehicle inspection certificates and insurance contracts. Every month we receive an e-mail with a report, which notifies me of vehicles, whose inspection certificate or insurance contract will expire soon. After linking it with the journey log book and records of costs I gained a tool for searching possible savings in running of the vehicle fleet.*

Jack, general service manager

#### Computers

*We keep a record of all company computers, their users, software licenses and acquisition documents in Fusio. In this way we can be sure if there is an inspection.*



## VARIOUS AGENDAS IN ONE



Keep a record of holidays, attendance, renting of goods and property, product sheets, templates of company documents or marketing materials in one clearly arranged and flexible system.

## It will make business consultant's work easier



### CLEARLY ARRANGED REGISTER OF BUSINESS



Access your cases easily, add attachments, keep a record of activities and use data from the address book to contact your customer quickly.



Dan, business consultant

#### History of trade negotiations

*In the Fusio database I keep a detailed record of my business cases, I note down individual activities (appointments, phone calls, e-mail communication, my notes and business goals...), I save attachments (for example offers processed in MS Word) and I can contact my customer easily using data in the address book – I send an e-mail or I can make a phone call directly from the Fusio environment (note: Thanks to the linking of Fusio with the application ANTS CTI Client). Thanks to linking of the client database with the accounting software I can even see in the client information card if there are any invoices after the due date.*

#### Overview of assigned tasks

*I know about all my tasks to complete immediately. Either assigned at meetings or outside of them, they are all recorded in Fusio and when a task is entered into the system by my superior, I always receive an automatic email notification.*

#### Immediate access to contracts

*All contracts in our company are recorded, scanned and saved as attachments in Fusio. According to my access rights, I can search a required document anytime I need it and our assistant Mary is not burdened by our requirements.*

## Administrator and users will appreciate



### FLEXIBILITY



Add agendas according to your needs with only a “click” and without the programmer writing a single line of code.