

CRM Sales Solution

Business Problem

Most CRM systems are inefficient, unconnected, and rigid, which impacts customer satisfaction and business revenue because they also tend to lack intelligence. Furthermore, they sometimes contain inaccurate and segregated data in multiple information silos, with no unified view of your customer's key data points needed to make well-informed decisions.

Impact

Because there is no 360° view of customer data, mistakes in the sales process cannot be easily identified and addressed. These mistakes lead to missed business opportunities, lost revenue, and potential damage to customer relationships.

Solution

Xebia's CRM Sales is built on Appian's industry-leading platform for process automation. It empowers organizations wanting to intelligently and efficiently manage customer relationships from lead generation, opportunity management, quote management, and sales-to-service. This allows companies to maximize revenue growth, resulting in happier customers, increased efficiency, and much-improved visibility for all stakeholders interacting with customers.

CRM Sales enables accounts teams to quickly configure the customer organization hierarchy, easily manage access across Xebia CRM application modules, effortlessly automate business-specific processes, and seamlessly manage business contacts and communications. By orchestrating across systems and data to create a unified customer view, sales teams get a single source of truth that's actionable.



Why CRM?

Because there is no 360° view of customer data, mistakes in the sales process cannot be easily identified and addressed. These mistakes lead to missed business opportunities, lost revenue, and potential damage to customer relationships.

- Lower implementation costs, configuration costs, and total cost of ownership thanks to low code
- High flexibility, agility, and scalability
- Readiness to use on day one
- A simple licensing model
- A future-proofed solution that's able to evolve with business needs
- Native mobility (any changes to the app are also automatically natively mobile without any additional development work)

“Xebia's award-winning CRM solution started delivering strong business value from day one.

The implementation has seen high business user adoption, helped reduce TAT and has given visibility to the stakeholders on key data points for effective decision-making. It acts as the single key platform that facilitated the advanced Franchise CRM functions.

- RBI

Key features and functionalities

Business Contact Management and Customer 360

A unified and integrated view of all key data points, interactions, and activities being performed across business contacts. Includes 360° views of leads, contacts, and customers to review and act on all the relevant information, leading to better customer relationships, driving business growth.

Opportunity and Quote Management

A bird's eye view of the opportunity pipeline to manage opportunities, including 360° views of each opportunity. Learn from the past by intelligently identifying similar opportunities and aggregating the learnings (including competitive analysis) improving opportunity win rate while reducing sales cycles.

Tasks, Activities, and Workflow Management

Execute automation by quickly configuring workflows just by point and click to schedule and manage tasks with notifications and due date reminders. Fully integrated with mail and calendar tools. Improved accountability and visibility for all stakeholders on the account team.

Campaign Management

Segment and manage lists, execute campaigns, define budgets, track ROI, and track campaign progress, all of which improves campaign effectiveness and qualified leads generation.

Real-Time Analytics and Actionable Dashboards

Leverage real-time dashboards for a 360° view of all critical activities including overall business performance, and a unified actionable interface to accomplish everything needed to sell and manage customer relationships. Segment contacts, leads, customers, and revenue from a geographical view.

Tailor It to Work the Way You Want

Configure everything you need to set up the CRM and get it up and running from day one. Organize hierarchy, application access, products and services, price books, T&Cs, email templates, auto-notifications, workflows and approvals, and much more.

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Xebia is a digital transformation leader, serving the top 250 global companies with comprehensive IT solutions. Operating in 16 countries with development centers across the US, Latin America, Western Europe, Poland, Nordics, Middle East, and Asia Pacific, Xebia's experts specialize in Technology Consulting, Software Engineering, Product Development, Data & AI, Cloud, Low Code, Agile Transformation & DevSecOps, and Quality Assurance. Alongside top-notch IT Consulting and Software development, Xebia offers time-efficient Standardized Solutions and education through its Academy. With a 100% YoY growth rate for two years, Xebia is a driving force in the expanding digital transformation market. Xebia was recently recognized as a leader in the "Low-code Application Development Services PEAK Matrix® Assessment 2023" for Appian services undertaken by Everest group.

For more information or to schedule a demo, please contact

Tarun Khatri || tarun.khatri@xebia.com

xebia.com