

# Features of Victoury CRM

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## 1. Workflow automation

Victoury CRM can make your life easier by automating your workflow. Set up custom rules and do sales force automation to help you and your team be more productive.

By using rules, you can set your CRM software to automatically perform a specific action based on triggers or events, such as these:

When a potential customer fills out a contact form on your website, the CRM software automatically directs the message to the right sales administrator who can assign the lead to the sales representative or department.

When a sales representative receives a message, the CRM software automatically sends a preset response to acknowledge the message.

If a lead, prospect, or opportunity doesn't respond to your message or proposal, the CRM software can automatically send a follow-up message after a preset amount of time, such as 48 hours or two business days.

When a sales representative makes calls or sends messages to a contact, the CRM software keeps track of all communications.

As sales representatives complete tasks, the CRM software allows supervisors and upper management to get custom performance reports.

## 2. Customization

No two businesses are the same, so Victoury CRM software can cater to your business's unique needs. Victoury CRM solutions allow you to customize basic areas, such as with the abilities to add contact fields, choose which data to show on your dashboard and create custom reports. You can also customize with extensions, plugins and other add-ons to expand your software's capabilities.

If you need even more customization to truly tailor the software to your business, Victoury CRM software offers more advanced options using APIs. This gives developers access to all technical specs and coding for full customization of your software. The API also allows you to integrate the software with existing business solutions your company uses to streamline processes.

## 3. Third-party integration

Connecting Victoury CRM software to other solutions you already use can save you tons of time and money. Victoury CRM offers third-party software integrations; Victoury can setup a custom API integration, where users can easily connect to solutions such as a third party ERP or accounting system, email marketing software.

Here are a few things you can do with the right third-party integrations to make your life easier:

- Import emails so you don't have to keep switching between apps.
- Automatically sync sales and order information with your accounting software to eliminate manual data entry.

- Automatically build email lists and launch email marketing campaigns.

Third party integrations may require specific IT custom development.

## 4. Customer service

Victory CRM software can help you acquire and retain customers by providing excellent customer service. The following capabilities will allow your sales reps and customer support team to perform their best:

- Gives you a 360-degree comprehensive view of customers that shows everything there is to know about a customer from the first point of contact
- Automatically tracks all points of communications, from lead acquisition to closed sales and sales histories
- Logs purchase histories, and other activities for future reference and to keep all reps on the same page
- Uses customers' first names to personalize all correspondence
- Has unique reference numbers for each account
- Automatically sends customers acknowledgments of their inquiries and messages so they don't feel ignored
- Supports premade email templates and call scripts that answer the most common questions

## 5. Employee tracking

Victory CRM software is a great way to track employee activity and performance. Employees can individually track their tasks, meetings, sales numbers, goals and other items. The software give supervisors and upper management access to dashboards that let them view individual employee goals, completed tasks and other metrics of productivity. This can help managers write employee performance reviews, create incentives, reward strong employees, and identify those who are struggling and address areas of improvement.

## 6. Lead management

The lead management feature will help you to identify your leads and the actions they've taken along the sales cycle. Through the lead management process, you'll be able to score your leads and, if needed, filter them off to a different member of your team to turn select leads into customers.

Sometimes dead leads sit in a CRM for weeks or months. A smart sales manager stays on top of leads and redistributes quiet or seemingly dead leads to different members of their team for reengagement.

## 7. Reporting

Reporting is the feature that brings the results of your sales and marketing efforts all together.

Some reports you can access:

- The number of leads that come in during a certain amount of time
- The number of sales generated during a certain amount of time
- Which of your sales agents closed which leads and how many they closed in a certain amount of time
- The number of outbound calls being made
- The effectiveness of your emails
- The stage at which your leads converted, helping you identify opportunities to close leads in a shorter time

## 8. Email

Tracking emails through a traditional inbox can get overwhelming and confusing.

It's important for every single sales email to be received and addressed in a timely fashion to increase the probability of generating revenue.

An email feature in Victoury CRM helps keep your sales reps organized and productive. Victoury can update third party calendars to schedule appointments and engage prospects and customers accordingly. Another great email feature is the ability to automatically pull in email templates so reps spend less time crafting email content. You can use this feature to create several email templates, such as these:

- Basic information about the company
- Follow-up after a phone call
- Follow-up after one email has been sent
- Follow-up to a proposal that reps are waiting on customers to return