



# Sanchay CRM

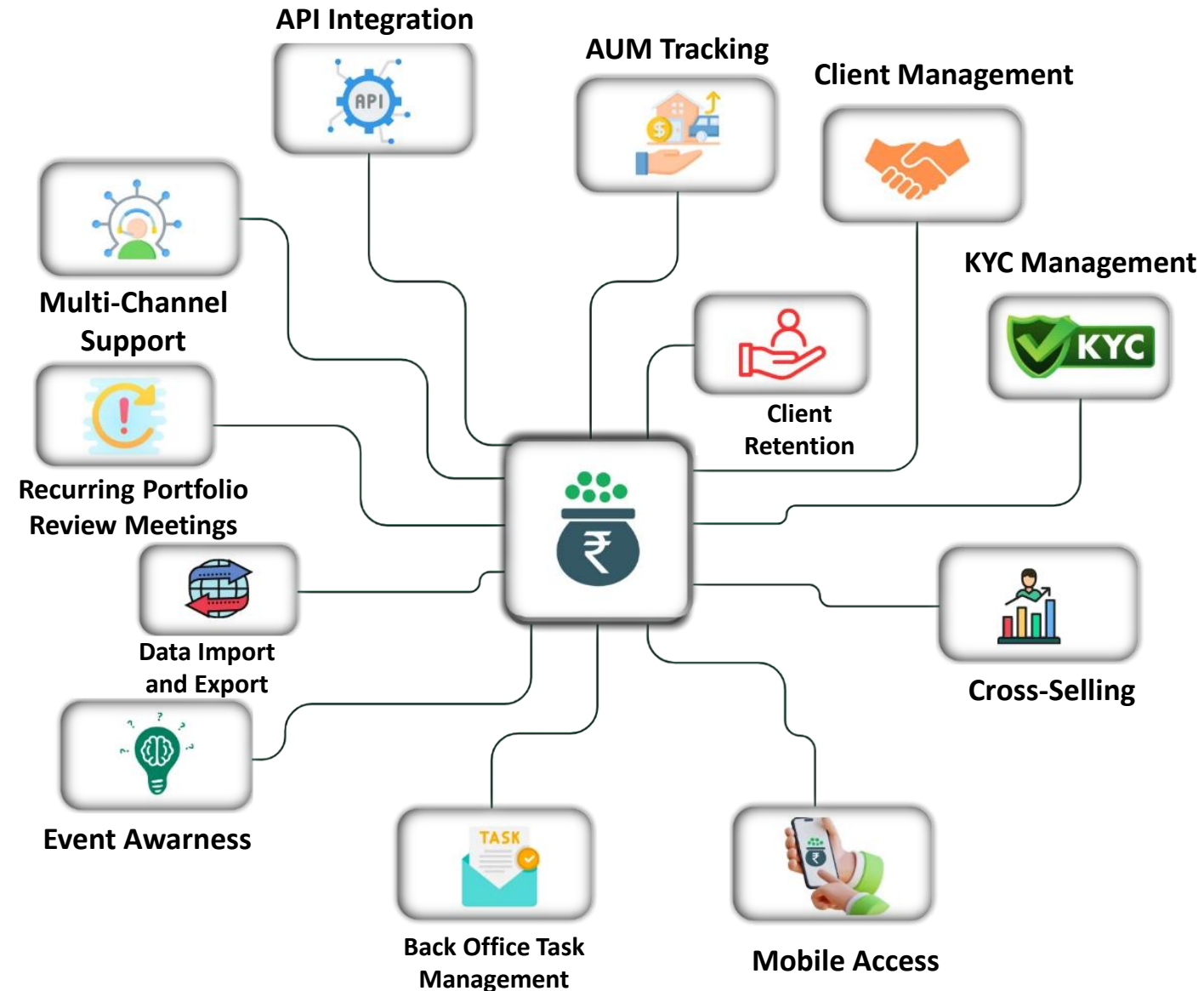
CRM for Investment Gurus



# All In One CRM For Financial Advisors And Mutual Fund Distributors

While portfolio management software like Investwell & Redvision helps you manage your client's investments, Sanchay CRM helps you manage your

- ✓ Sales
- ✓ Client Relations
- ✓ Back-office tasks.



# Optimize Your Financial Advisory Operations

Stay organized and build stronger client relationships with Sanchay CRM.



## Centralize Client Database

Keep all your clients family, organization information organized and accessible in one place, ensuring smooth management and easy access.



## Resolve Client Queries

Manage and resolve client queries received from different sources & auto assign to agents and send updates to the customer on time.



## Manage Back-Office Tasks

Streamline administrative tasks and back-office operations, allowing you to focus more on client relationships and growth.



## Track Enquiries & Follow-Ups

Never miss a lead or follow-up with automated reminders and real-time tracking of all client inquiries.



## AUM Data Process

Keep all investment information against family organization and see a holistic view of AUM, Investment and Loans.



## Streamline Portfolio Review Meetings

Schedule, manage, and track recurring portfolio review meetings with ease, ensuring timely appointments and client satisfaction.

## Trusted by Leading Organizations



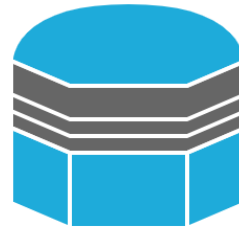
# Centralize Your Client Database

Centralize and manage family, organization, and member-wise data in one place, accessible via web and mobile apps.

## Key Features of Client Database Management

### Data Import/Export

Facilitates seamless data transfer



### KYC Management

Ensures compliance with identity checks



### Communication Tools

Enables easy greetings and campaigns

### Duplicate Record Management

Cleans and removes duplicates



### AUM Data Processes

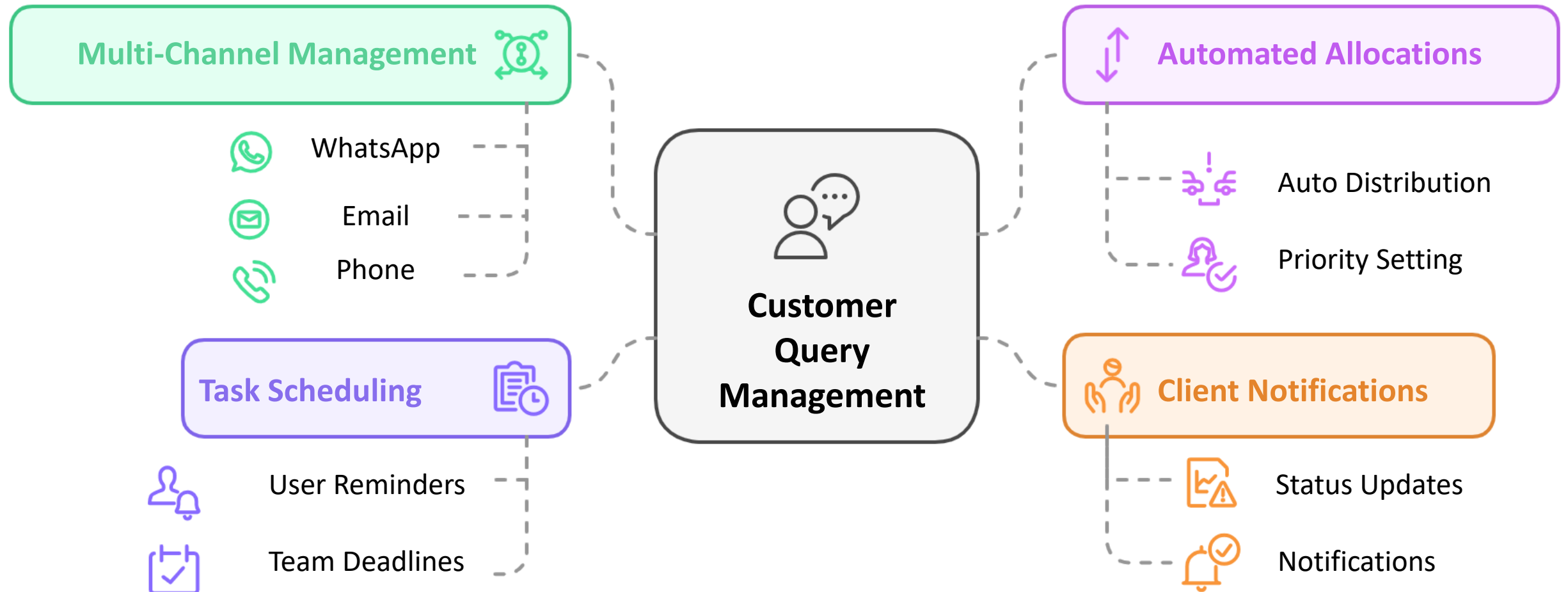
Manages assets under family, organization



# Efficiently Handle Customer Queries

Effortlessly manage customer queries across multiple channels and automate query allocations.

## Efficient Customer Query Management



# Lead Management

Consolidate leads from all channels into one platform for seamless management and improved efficiency.

## Lead Management

### Lead Consolidation

Centralize leads from all channels



### Automation & Reminders

Streamline lead assignment and follow-ups



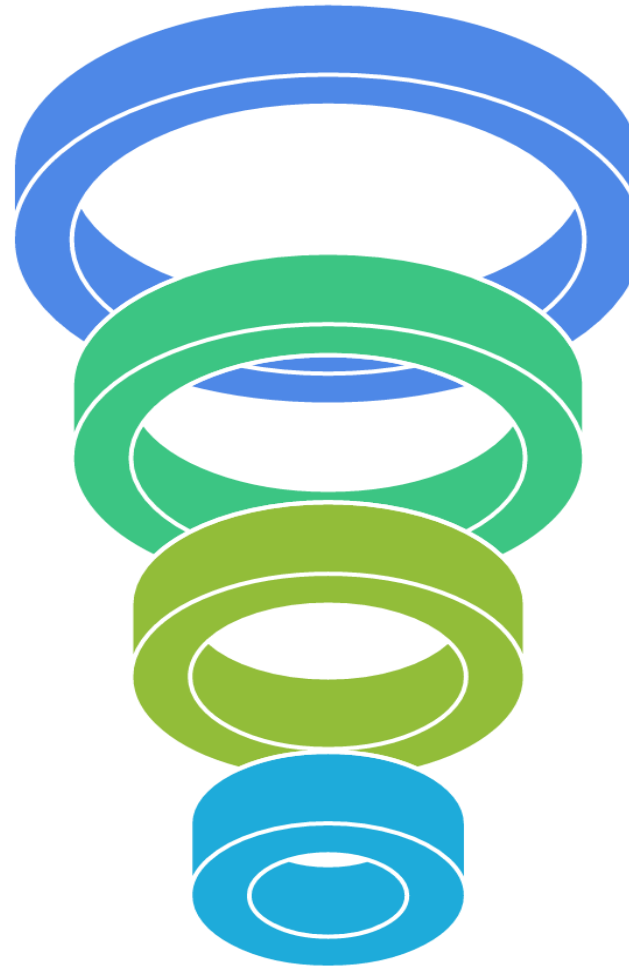
### Follow-ups

Streamline lead assignment and follow-ups



### Funnel Visibility

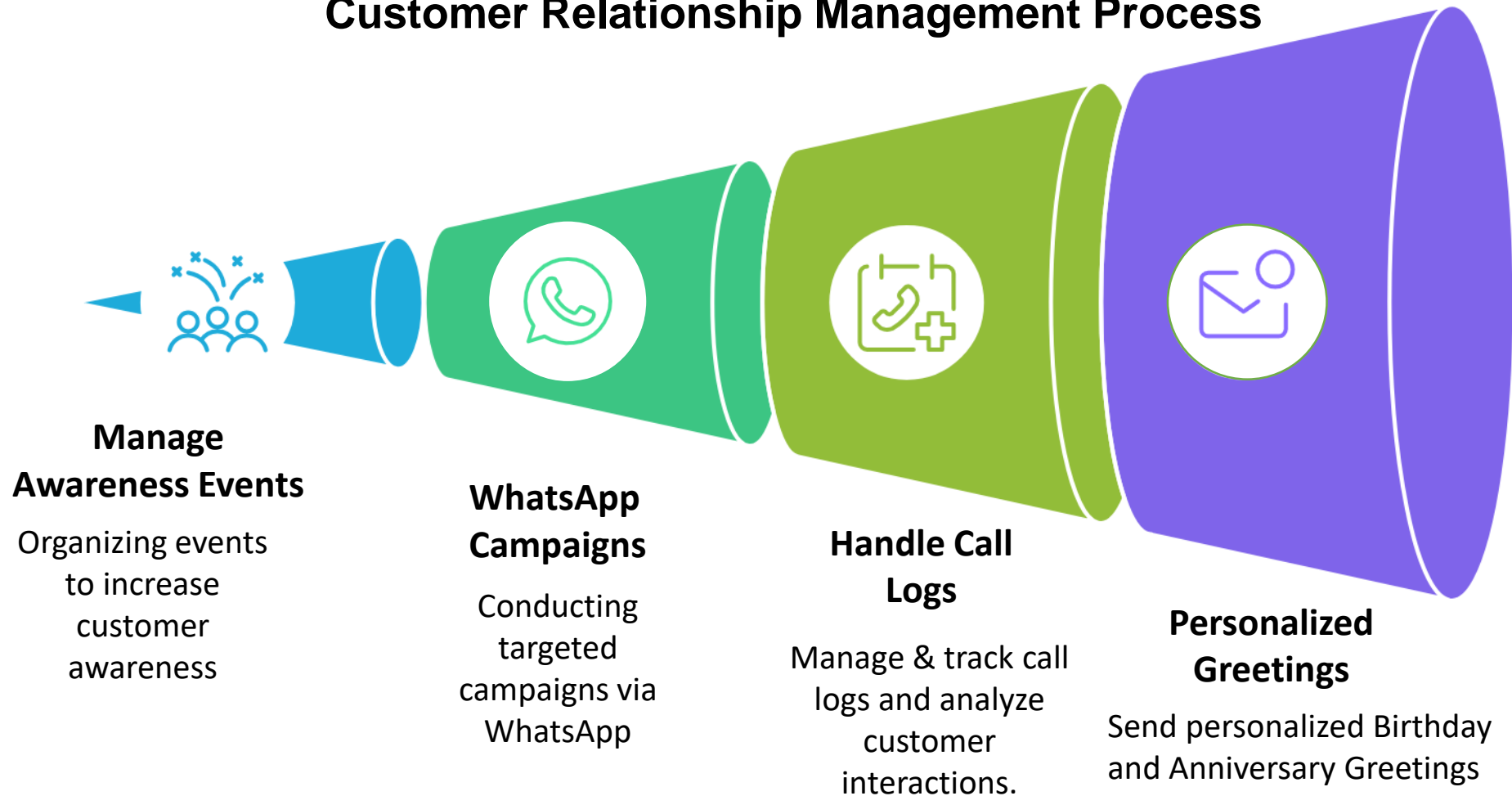
Monitor and analyse lead funnel



# Manage Customer Relationship

Manage customer relationships by efficiently managing communication, interactions, and personalized engagement.

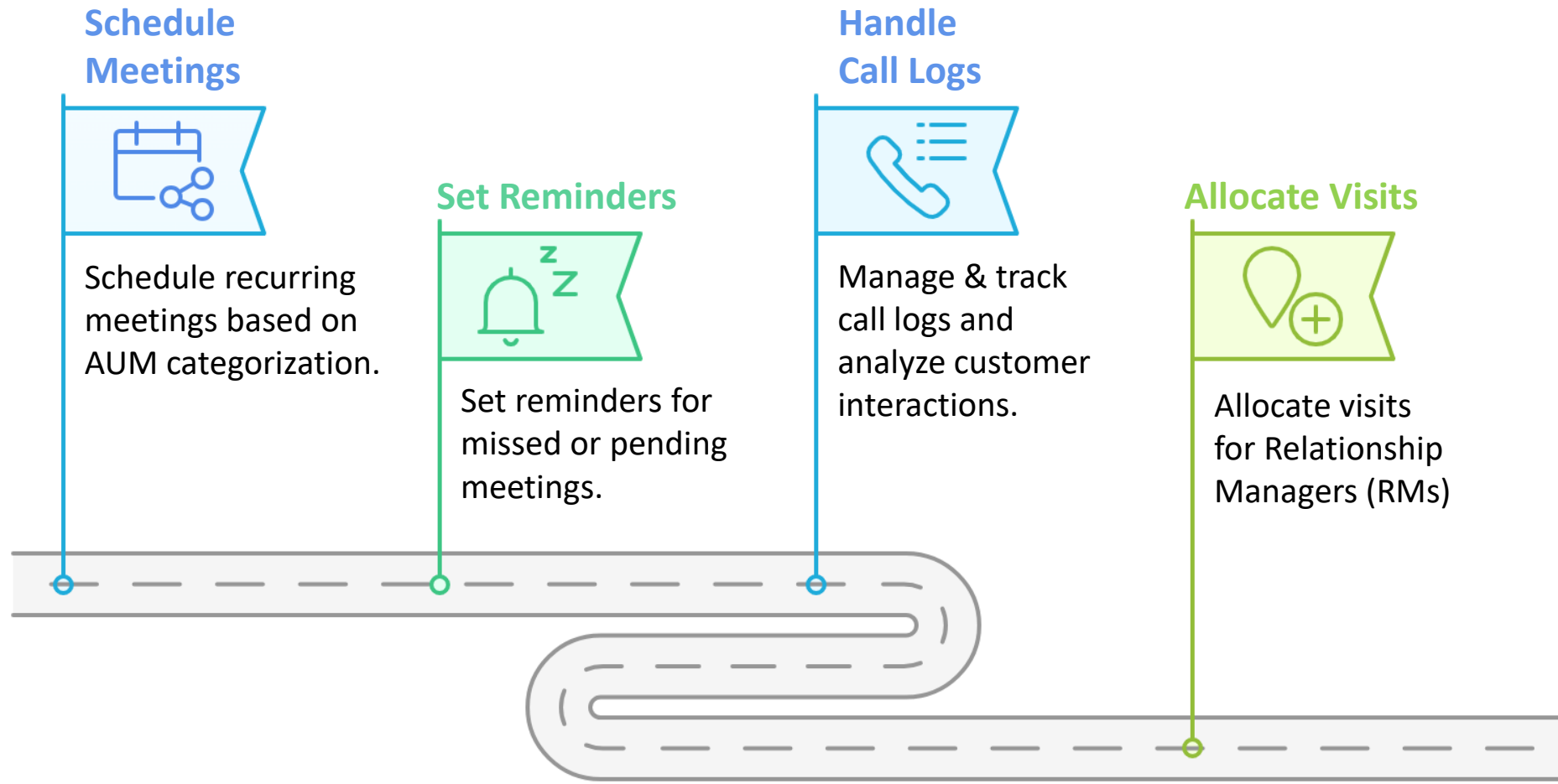
## Customer Relationship Management Process



# Streamline Portfolio Review Meetings

Effortlessly manage portfolio review meetings, set reminders, and auto-allocate visits for improved efficiency.

## Streamlining Portfolio Review Meetings



# Challenges Businesses Encounter Without a CRM



## Disorganized Leads

Disorganized lead handling results in missed conversions and wasted resources.



## Scattered Information

Scattered information creates chaos, reducing efficiency and decision-making speed.



## Unstructured Process

Unstructured strategies creates chaos, missed revenue potential and customer.



## Missed Opportunity

Scattered data leads to loss cross-sell opportunity.



## Communication Gap

Missed follow-ups lead to lost opportunities and weakened client relationships.



## Delayed Responses

Delayed responses impact satisfaction and quality.



## Weak Interactions

Weak customer interactions reduce loyalty and value.



## Manual Tasks

Time-consuming manual tasks hinder productivity and growth.



## Manual Reporting

Lack of real-time analytics weakens strategic planning and forecasting.



## Limited Accessibility

No mobile or cloud access restricts data access, causing delays and lower productivity.



## Security Risk

Inadequate security measures expose businesses to cyber threats and data breaches.



## Disconnected Systems

Disconnected systems limit efficiency and operations.

# Why Choose Sangam CRM?



## Lead Management

Captures, organizes, and prioritizes leads, ensuring a structured sales approach.



## Centralized Database

All customer data is centralized for quick access and faster decisions.



## Structured Operations

Streamlines process with data, segmentation, and automation



## Cross Selling Opportunity

CRM enables cross-selling by tracking data, history, and preference.



## Automated Follow-Ups

Automates follow-ups reminders to ensure no communications are missed.



## Ticketing System

Automates responses and routes inquiries for faster resolutions.



## Unified Communication

Facilitates engagement across multiple communication channels.



## Task Automation

Automates repetitive tasks, emails, and follow-ups, freeing up time for strategic activities.



## Dashboards & Reports

Provides insights & data for informed decision-making.



## 24x7 Anytime, Anywhere

Manage all operations efficiently through both web and mobile platforms.



## Security Protocols

Ensure data security with user-specific restrictions, email or phone masking.
















## Seamless Integrations

Connects with third-party apps for a unified business ecosystem.


# Seamless Integration with 3<sup>rd</sup> Party Applications

Sanchay CRM integrates with various third-party applications, enhancing its functionality and ensuring seamless operations across different platforms.

B2B Portal	  
Telephony	    
WhatsApp	
Business Suite	
3rd Party Apps	  

# Choose The Best Plan For Your Financial Goals

Common Features	Starter	Growth
	₹ 15,000 / Year Upto 20 Users	₹ 12,000 / User / Year Starting from 5 users
Centralised Customer Database Management	✓	✓
Customer Query Handling	✓	✓
Lead/Enquiry Management	✓	✓
Communication & Marketing	✓	✓
Attendance Management	✓	✓
Global Search for Web/Mobile	✓	✓
Call Logging	✓	✓



**Implementation charges One time Additional**



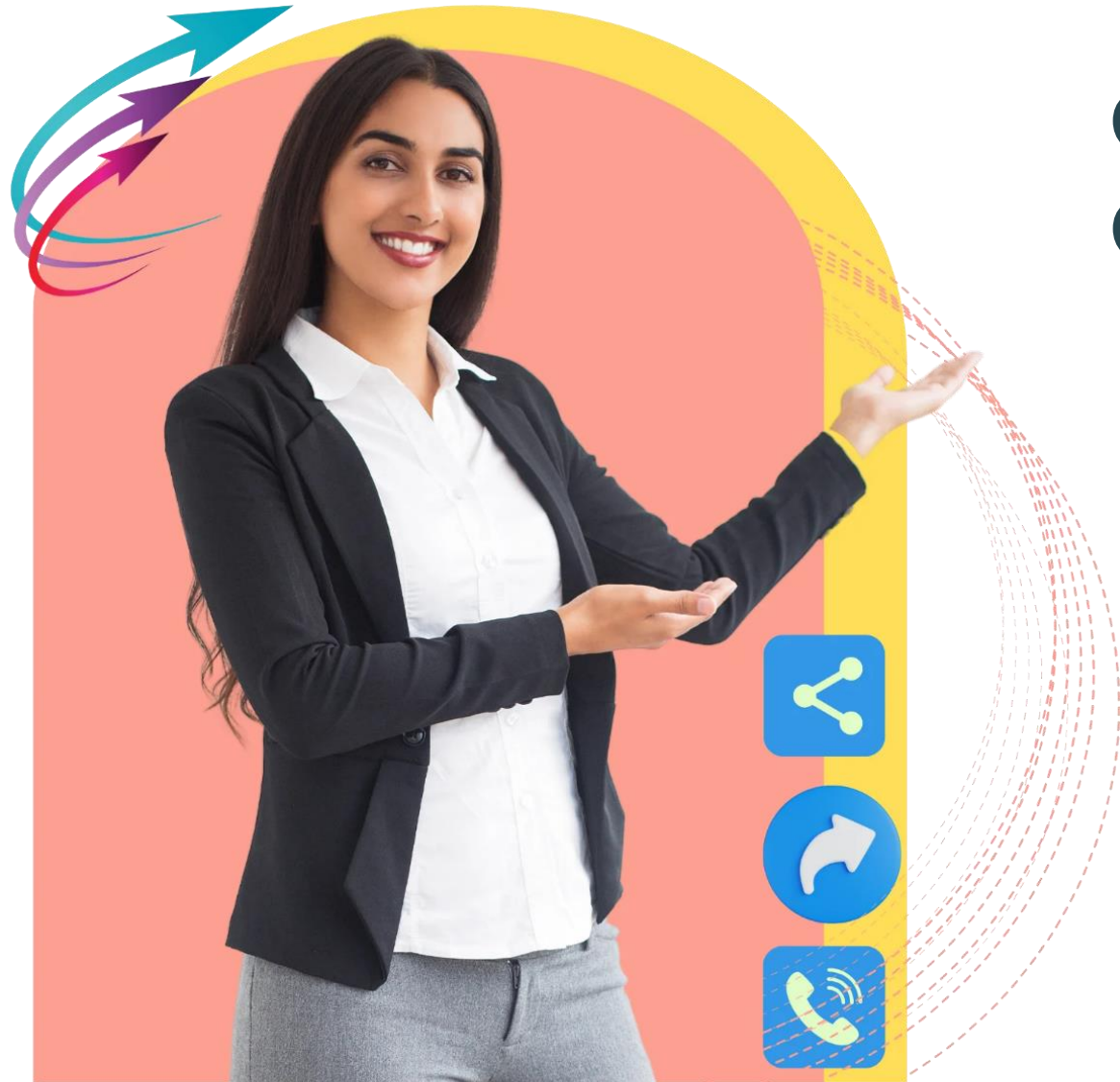
# Choose The Best Plan For Your Financial Goals

Advance Features	Starter	Growth
	₹ 15,000 / Year Upto 20 Users	₹ 12,000 / User / Year Starting from 5 users
Track SIP / Policy Renewals	✗	✓
RM wise Client visibility	✗	✓
Document & KYC Management	Single Document Management	Unlimited Document Management
Streamlined Portfolio Review Meetings	Manual	Automatic
Admin Configuration	✗	✓
Integration	✗	✓
Advance Security Features	✗	✓



**Implementation charges One time Additional**





# Optimize Your Financial Advisory Operations With Sanchay CRM

Experience seamless client management, enhanced security, and streamlined workflows with Sanchay CRM.

[Activate Instance](#)

**Contact us for demo!**

Nikhil Bhagat

**Comp-U-Graphics**

+91-9830026226

[compugraphic4u@gmail.com](mailto:compugraphic4u@gmail.com)

[www.comp-u-graphics.com](http://www.comp-u-graphics.com)

