sweet CRM

PRODUCT SHEET

About Sweet for Sales

Do you struggle with your sales management?

If the world of sales management feels like a complex puzzle, you're not alone. It can be tough to juggle leads, activities, and conversions seamlessly. On top of that managing it all, making sure priorities are right to enhance the chance That's where Sweet CRM combined with Sweet Automation step in – your professional allies in simplifying sales.

We know a lot about customer processes. We also know how to fix them

No need to stress. Sweet CRM and Automation are here to streamline your processes with user-friendly precision. Explore a smoother path to managing sales effortlessly and experience the efficient touch of automation. Let's make your sales activities more straightforward and effective. We guide you everyday, so you know your next step without having to keep it in mind.

We'll support you in the process of transforming potential leads, into loyal customers in a smooth and efficient way, from the top of the

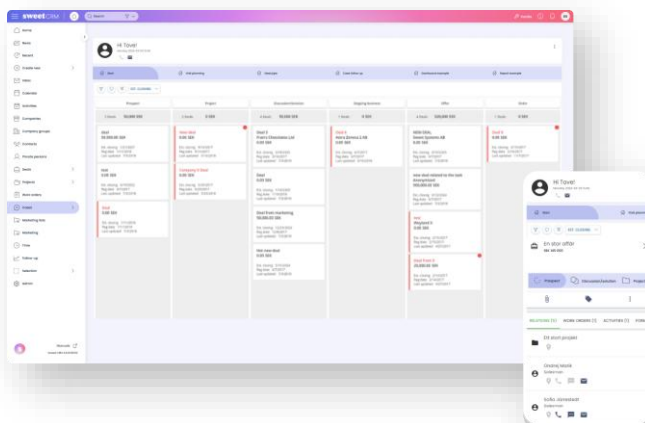| Awareness |
| Interest |
| Evaluation |
| Consideration |
| Decision |
| Loyalty |

"sales funnel" to the very bottom. No opportunity should fall through the cracks with Sweet, the platform will help you plan your day, your week and next activity with friendly reminders and useful rules of how and when to interact.

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Sweet sales management

Sweet's approach to sales excellence

Sweet's sales approach is designed for simplicity, through **digitalization** and **automation**. We aim to guide your potential leads seamlessly through the sales funnel, in a digital way utilizing automation to enhance efficiency, gaining or maintain control, and easily track measurable results. Our solution, **Sweet CRM**, operates in tandem with our automation engine and integrations hub, **Sweet Automation***. This unique combination allows you to harness the advantages of reducing manual steps in your sales process while preserving the crucial aspects of human interaction. How do we achieve this? By providing a centralized platform that allows you to monitor and manage leads, prospects, customers, goals, results, contacts, details, interactions, and activities—all within one place.

We offer pipeline management for a strategic overview, as well as the deals to really zoom in and work on each opportunity. Managers can easily see the totals, predictions and follow-ups by sales team or representative. Where the sales representatives can work on an activity-based level on prospects or customers, managing the deals.

Lead Management | Prospecting | Pipeline | Deal Management Activity Tracking | Follow-up | Customer Journey Builder Business Process Automation | Integrations 360° Customer view | Segmentation

* CRM Automation & Sweet Automation Unlimited can be added to your Sweet for Sales subscription.

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Begin the sales journey

Awareness through lead generation

In the sales funnel's initial stage, Sweet for Marketing is your go-to for strategic marketing, seamlessly connecting inbound and outbound efforts. During this phase, the sales team dives into prospecting via cold calls, initial emails or meetings. Sweet CRM serves as the central hub for contact details and activity logs, simplifying prospecting, call list creation, and email/task management.

Lead nurturing to gain interest

In the Interest stage of the sales funnel, the sales department qualifies leads to gauge their potential as customers. Sweet advocates for an automated approach, transitioning from time-consuming 1-1 activities to a more scalable 1-many strategy. Connect with e-marketing

Effortless lead management and nurturing

Sweet simplifies lead integration and gathering, offering effortless management. Utilize our integrations and automation* engine to seamlessly incorporate new lead sources and automate communication and activities – or easily register new leads from anywhere.

Lead - Service
50,000 SEK

Est. closing   2023-11-08
Reg date   2023-11-08
Last updated   2023-11-08

Entering the pipeline

At this point, the leads usually enter the sales pipeline as new leads, with all the information available about it.

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Sales getting warmer

Evaluation phase

In the evaluation phase, our CRM becomes your command center, consolidating all customer interactions, conversations and offerings into one comprehensive source. Guiding you to the next step.

- **Unified customer tracking**
  Log all activities and interactions systematically for a unified customer view, as it centralizes data for a unified view of the customer's journey.
- **Communication logging**
  Efficiently log phone calls, meetings, and emails and interactions.
- **360° Customer view**
  Main stakeholders are strategically linked to your business opportunities within the CRM, providing a holistic 360° view of your potential customer.

Consideration

During consideration, similar to the evaluation phase, the importance of effective tracking intensifies. More stakeholders may be involved, and document sharing or agreement and conversations expand. Sweet CRM simplifies this stage:

- **Clear visibility and prioritization of sales pipeline**
  Sweet CRM offers clear visibility into the estimated value and probability of success for each opportunity that enables prioritization based on potential, preventing missed opportunities.

- **Document and file organization**
  The CRM provides a secure platform for sharing and organizing documents internally or with customers.

- **Preventing any opportunity from falling through the cracks**
  With numerous opportunities in play simultaneously, the CRM allows for efficient tracking and tracing of each opportunity. The sales representatives can now manage and nurture multiple opportunities concurrently.

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Homerun or deal breaker?

Decision

Yes or no?

In essence, the decision phase is about refining the offering, addressing concerns, and guiding the customer toward a positive decision. The CRM acts as a strategic tool, centralizing information and enabling sales representatives to navigate the decision phase with efficiency and precision.

Informed negotiations

With comprehensive interaction logging, Sweet CRM provides all the details needed for effective negotiations. Proposals, quotes, and discussions are at your fingertips for a tailored approach.

Decision recording

After the decision, Sweet CRM lets you record reasons for follow-up and analytics. Log accepted/rejected products, enhancing future predictions and strategies.

Analytics for precision

Leverage abundant data for enhanced analytics, making your decision-making more strategic.

Collaborate between departments

Beyond sales, Sweet CRM acts as a centralized source for seamless communication between departments. All the right information is available for handovers, support management, and aftersales.
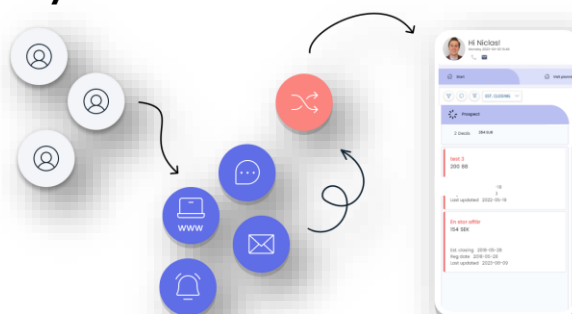
Loyalty

Loyalty

To enhance the chance of loyal customers, communication and a sence of the customers needs and interests is key. Sweet can help you segment your customers, and automate reminders for next point of contact – or create automated communication in the Customer Journey Builder.

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Form your Sweet sales journey

Customer Journey Builder

Building customer loyalty requires a strategic approach that spans the entire customer journey. By leveraging a customer journey builder, businesses can create personalized experiences, maintain consistent branding, and anticipate customer needs. From reward programs to post-purchase engagement, the journey builder becomes a key tool in fostering lasting customer loyalty. Here's a strategic approach:

1. **Define objectives:** Begin by defining your goals for automating customer interactions. Determine what you aim to achieve, whether it's improving engagement, streamlining communication, or enhancing customer satisfaction.

2. **Segmentation strategy:** Segment your audience based on relevant criteria to personalize interactions effectively.

3. **Automate or not:** Decide which aspects of the customer journey you want to automate first, and which tasks should remain under human control. Striking the right balance between automation and human touch is key to success. We recommend to start small but think large.

4. **Start the journey:** Initiate your customer journey by choosing the optimal starting point. Consider where your customers enter the journey and how you can engage them effectively along the way.

5. **Map the journey:** Define what should happen along your new customer journey. Map out a sequence of interactions, messages, and actions to create a seamless and engaging experience.

6. **Flexible refinement:** If necessary, divide the journey further based on specific criteria. Refine your journey or segmentation to cater to diverse customer needs and preferences. It's easy breezy.

Sweet Automation's customer journey builder puts you in control, allowing you to create tailored, proactive interactions that drive results and customer loyalty while lowering costs.

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Functions

My top two functions in Sweet CRM!

Viktor Mattsson,
Business Unit Manager Sweet CRM

Pipeline management

Effortlessly visualize and manage your sales pipeline and opportunities with Sweet CRM. From lead acquisition to deal closure, our intuitive pipeline management ensures clarity, prioritization, and seamless tracking of every stage in your sales process. Stay in control and drive success with a comprehensive view of your opportunities.

Follow-up and dashboards

Empower informed decision-making through Sweet CRM's follow-up tools and dashboards. Track interactions, activities, and opportunities effortlessly, selecting your preferred level of detail—whether by region, division, or user. For data-driven organizations, explore **Sweet Performance** — an intuitive and customizable dashboard tool offering real-time insights. Visualize metrics, monitor goals, and stay ahead with integrated list in Panorama View or dashboards designed for effective sales management.

Roles and groups

Set up user roles and groups in Sweet CRM to align with your organizational structure. Define access levels, streamline collaboration, and assign responsibilities efficiently.

Outlook integration for email and calendar

Seamlessly integrate your email and calendar with Sweet CRM using our Outlook integration. Capture and log emails directly within the CRM, synchronize calendars, and ensure that all communication is centralized. Enhance efficiency by managing your email and calendar activities within the familiar Outlook environment.

Prospecting and segmentation

Sweet supports you to segment and target your leads or customers based on rules and criteria of your choice, when done – prospecting and upsells is easy!

Online based platform

Sweet CRM is easy to bring along, access it from where you are from your smartphone, tablet or computer!

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Functions

Convert your opportunity into a project

Easily convert your sales into a project and continue the customer journey within Sweet CRM. Here you will find support for managing **work orders** and **service appointments**, as well as **articles** for services/ product together with **price lists**. It's a convenient way to plan, set budget, divide the work and visualize the progress of projects, work orders and service appointments.
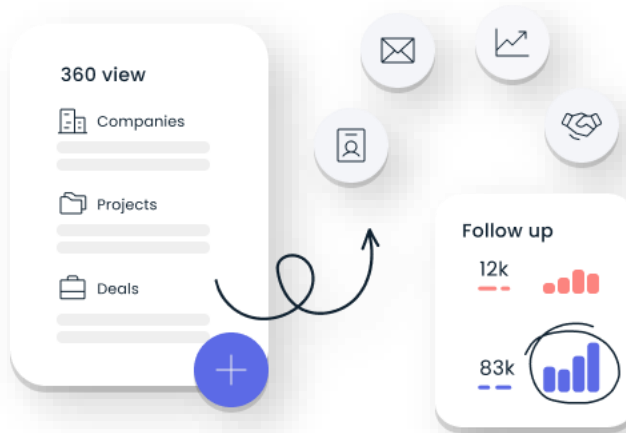
Automations and rules engine*

Optimize your workflow and reduce manual tasks with Sweet CRM's powerful automation and rules engine. Set up custom rules to automate repetitive processes, ensuring consistency and efficiency. From communication to task automation, Sweet CRM's rules engine enhances productivity and keeps your sales process seamlessly on track. Either schedule your tasks, trigger it on demand or wait for signals – it's up to you!

Integrations and API*

Expand the capabilities of Sweet CRM by integrating with a variety of third-party tools. Our flexible integrations and robust API allow you to connect Sweet CRM with your existing systems and processes. Tailor your CRM experience by incorporating additional functionalities that suit your business needs.

Files and documents

Organize and share documents effortlessly with Sweet CRM. Centralize files related to customers, deals, offers and projects. Collaborate seamlessly by storing and accessing documents within the CRM.

* CRM Automation & Sweet Automation Unlimited can be added to your Sweet for Sales subscription.

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Add-ons for enhanced sales

Sweet Forms for data collection

As part of getting to know your customers, onboard them and get their feedback, it's crucial to engage with them and gather valuable information. Sweet offers exceptional solutions for conducting digital forms or surveys for collecting customer insights through user-friendly online forms. With our powerful digital form capabilities, you can extract the information you need to make informed decisions and take meaningful actions – easy for customers!
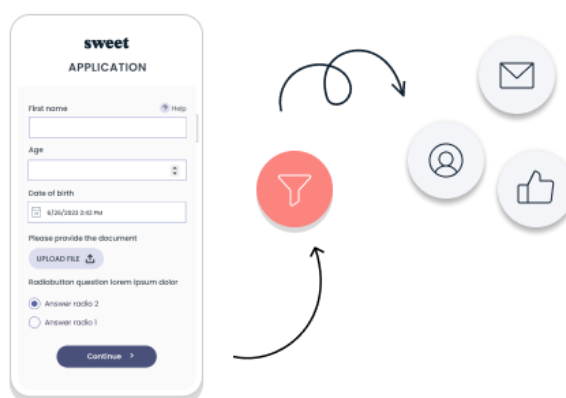
Key features

- **Seamless digital forms creation:** Easily create customized forms or surveys tailored to your specific needs using Sweet's intuitive Form Designer. Design engaging forms that capture customer opinions or information effectively. Of course, it can be automated!

- **Seal the deal:** Sweet Forms can be used for your agreements, specifying the sales order and finished with a digital signature, quick and secure!

- **Smooth onboarding:** Ask just the right questions, at the right time, in a way that's easy to understand, access and complete for your customers.

- **Use the data you have and pre-populate it**, the customer can focus on answering the things you *do not* already know.

- **Actionable insights:** Empower your decision-making process with the valuable insights gathered from customer feedback. Identify areas for improvement, optimize your strategies, and enhance customer satisfaction.

- **Automation**: Let Sweet Automation help you create rules and manage the responses - and make decisions in real-time.

Read more

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Add-ons for enhanced sales

Sweet Performance for analytics

Are you ready to elevate your sales performance to new heights? Sweet offers real-time dashboards and monitoring: Stay up to date with our dynamic dashboards and real-time monitoring capabilities. Track key metrics, visualize data with customizable graphs, and gain invaluable insights into your operations. All in a very user-friendly manner so everyone can do it!
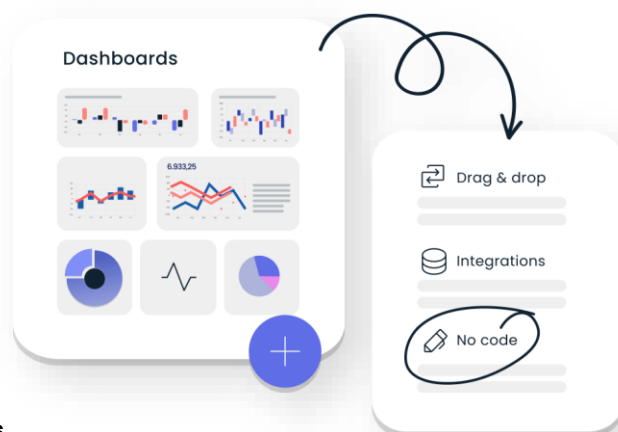
Key features

- **Do It Yourself:** Sweet's user-friendly interface empowers you to take control. Customize your dashboards and charts according to your unique needs, putting you in the driver's seat of your performance analysis.

- **Sales tracking:** Keep a close eye on your sales performance with our comprehensive charts where you create your own sales tracking. Identify trends, spot opportunities, and make data-driven decisions that drive growth.

- **KPI setup and measurement:** Define and measure your Key Performance Indicators (KPIs) effortlessly. Sweet simplifies the process, ensuring you're always aligned with your business objectives.

- **Goals and metrics:** Set clear goals and track your progress with precision. Sweet's goal-oriented approach makes it easier than ever to stay on the path to success.

- **Seamless insights sharing:** Collaboration is a breeze with Sweet. Share your insights easily with your team or managers, fostering a data-driven culture that fuels competition and results.

- **Multi-source data integration:** Sweet isn't limited to one data source - Sweet Automation makes it possible. Integrate data from multiple sources to get a holistic view of your performance, allowing for more informed decisions.

Read more

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Integrations

Website

Capture leads from the website, from digital forms or whenever someone downloads a white paper.

E-mail marketing

Spotler Webpower for email efficient and smooth e-mail and SMS marketing.

SYMPLIFY

Symplify will help your e-mail marketing and communication reach the next level.

Calendar and mailbox

Microsoft Outlook integration for syncing e-mails and calendar smoothly.

Customer portal

Communicate in a customer portal where your customer can keep all interactions and information in one place using Sweet Customer Portal connected to the Sweet CRM.

API

Don't you find the integration you're looking for?

With our API:s it's easy to build new integrations.

Find our API documentation here

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Security and Compliance

Authentication

We offer a diverse range of authentication options tailored to meet your specific needs for securing your data. Some of the providers we support

- SweetID
- Microsoft Entra ID (previously Azure AD)
- Google

User access controls

We provide various user levels, ranging from basic users to administrators, each with different access rights and privileges. Your assigned user level will determine the extent of access you have within the system.

GDPR

Our solutions are fully compliant with the current regulations outlined in the General Data Protection Regulation (GDPR). We prioritize the security and privacy of your data, and our platform includes built-in features to support anonymization or deletion of data as well as the ability to tag sensitive information. With our GDPR-compliant solutions, you can trust that your data is handled in accordance with high privacy standards.

Information security

At Sweet, we prioritize the security of your data and we are proud to be ISO 27001 "Information Security Management" certified. With our well-established processes, we ensure that your data is always handled and managed securely. Data and information security are of utmost importance to us, and we go above and beyond to safeguard your valuable information.

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Infrastructure & Storage

Platform details

Sweet for Sales is a bundle of Sweet CRM and Sweet Automation.

• **Sweet CRM** and its capabilities of holding marketing plans, projects and activities, together with contact details to your customers, suppliers, partners leads etc. Sweet CRM acting as your best interface for overviews and your everyday work.

• **Sweet Automation** and its automation capabilities together with the rules engine to automate your sales processes and interactions. This is also the place where the integrations to lead sources, e-marketing providers and other systems is managed.
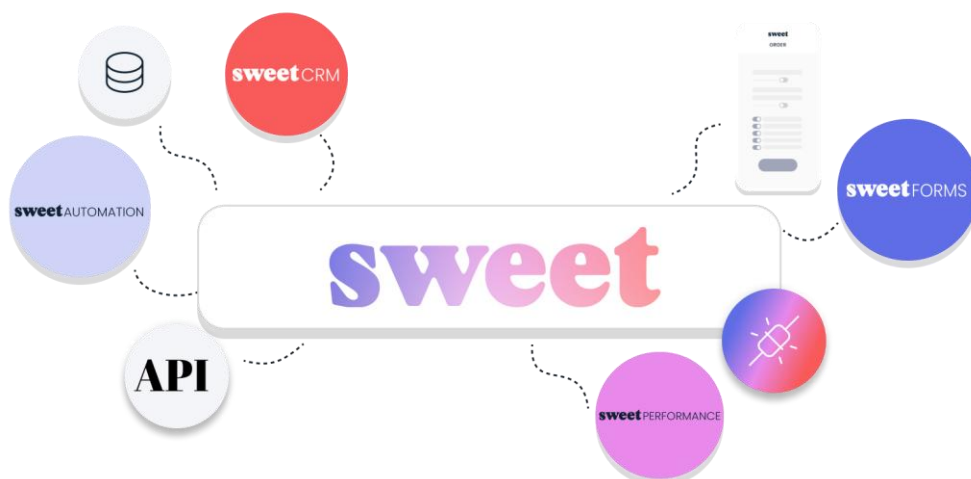
Setup

Our setup model is easy, it's a digital platform with a cloud first setup strategy (but we can help you set it up locally when required.)

    • Microsoft Azure Cloud, either shared or separate cloud
    • On-premise

Storage

Just like the setup, storage is connected to the chosen setup model. We offer storage

    • Microsoft Azure Cloud, either shared or separate cloud
    • On-premise
    • For highly sensitive data, that requires encrypted storage, or storage located in Sweden – we partner up with Synkzone that offers secure and encrypted storage in the cloud. **Read more**.

Infrastructure & Storage

Selections

Selections form the foundation of data extraction. The selections can be divided into two parts, metadata and the selection templates:

Metadata of the selections

The selection engine stores metadata about data sources within the platform. This metadata includes:

- Names and descriptions of tables and columns in a relational database.
- Paths, filenames and filetypes of files stored either on network shares or online
- API endpoints

Sensitive metadata, such as connection strings and authentication credentials, is encrypted for security. Only administrators with the necessary permissions can access the metadata of the selections.

Selection templates

Using the stored metadata, users can craft selection templates. Upon execution, these templates extract data from the data source, which might be sensitive or non-sensitive. Every extraction is logged, capturing details like:

- User access and potential data exposure
- Time of extraction
- Exact database query details
- Amount of data rows returned

Selections may be locked so that they cannot be changed by any other user (or admin). All selection templates and the data extraction logs can be accessed by all users of the system.

Storage continuing

Flows

Users of the system can build flows that execute actions. These actions may perform a whole range of different tasks. For example, send or retrieve emails, export or read a file, update a database, do API calls, etc.

While doing this Sweet Automation needs to retain some data to keep state of ongoing processes. This data could be unique IDs like CaseId, AccountId, CustomerId or anything else that uniquely identifies "the object that is being processed in the flow" that we call the "flow participant".

Infrastructure & Storage

Users may choose where to store the flow related data. Either

- Within the platform.
- In any relational database table, outside of the platform.

Depending on the nature of the data the user can decide which storage fits best per flow.

Logging

Every run within a flow is logged, capturing details like:

- User that scheduled the run
- Start and end date of the run
- Affected rows of the run
- The exact configuration of the action at the point of the run
- If any selection templates were used within the run, that is logged according to the specification above.

Flows may be locked so that they cannot be changed by any other user (or admin).

Flow may be configured to run in "test mode" where selected action runs are skipped.

All flows and all run logs can be accessed by all users of the system.

Files uploaded in the flows

Users have the possibility to upload files into Sweet Automation that might be needed for a specific Flow.

These files are stored within the platform and can be accessed by all users of the system.

Don't hesitate to [contact us](#) with your questions, we're happy to serve!

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Are you ready to get started with Sweet?

Contact us