## Product Overview

HERMIS CRM is a centralized customer relationship management platform designed to help organizations manage leads, sales activities, customer accounts, marketing campaigns and performance tracking in one unified system. It provides clear visibility into sales pipelines, booking plans, and customer data through intuitive dashboards and reports.

HERMIS CRM is built for modern sales teams, enabling better planning, improved tracking, and data-driven decision-making without unnecessary complexity.

## Key Objectives

• Manage leads and customer data effectively

• Track sales activities and booking plans accurately

• Provide clear visibility into sales performance

• Support data-driven decision-making through reports and dashboards

• Enable scalable CRM deployment for growing organizations

## Core Capabilities

### 1. Lead Management

HERMIS CRM captures and manages leads throughout the sales lifecycle.

• Lead creation and tracking

• Lead status and ownership management

• Conversion of leads into accounts and contacts

• Complete lead interaction history

### 2. Sales Activity Management

The platform enables sales teams to track and manage all sales-related activities.

• Logging of calls, meetings, and follow-ups

• Activity timelines for each lead and account

• Task tracking to ensure timely sales actions

• Calendar-based activity visibility

### 3. Sales Booking Plan

HERMIS CRM helps teams plan and monitor sales bookings against targets.

• Booking plan creation and tracking

• Planned vs actual sales comparison

• Period-based booking visibility (monthly / quarterly)

• Support for sales forecasting and planning

### 4. Accounts & Contacts Management

HERMIS CRM maintains a structured view of customers and key stakeholders.

• Centralized account records

• Multiple contacts per account

• Contact roles and communication history

• Easy access to customer details for sales teams

### 5. Campaign Management

HERMIS CRM supports planning and tracking of marketing campaigns with performance

visibility.

• Campaign creation with ownership, status, and duration

• Tracking of revenue and campaign costs

• Measuremen to leads, responses, and conversions

• Monitoring of opportunities and campaign impact

### 6. Reports & Analytics

The platform provides detailed reports to analyze sales performance and customer data.

• Lead and opportunity reports

• Sales activity and booking reports

• Account and contact reports

• Custom report generation

## 7. Dashboards

HERMIS CRM offers visual dashboards for quick insights into business performance.

• Sales pipeline overview

• Booking performance indicators

• Lead and activity summaries

• Real-time performance visibility for leadership

## 8. Calendar & Scheduling

Integrated calendar functionality helps sales teams manage time efficiently.

• Schedule meetings and follow-ups

• View activities by day, week, or month

• Alignment of sales activities with booking plans

## 9. Secure and Scalable Architecture

HERMIS CRM is designed for enterprise use.

• On-premise or cloud deployment

• Centralized database for CRM data

• Secure role-based access control

• Scales with organizational growth

Operational Benefits

• Improved sales visibility and tracking

• Better planning and forecasting accuracy

• Increased productivity of sales teams

• Centralized customer information

• Clear reporting for management decisions

## Ideal Use Cases

• Sales Teams

• Business Development Teams

• Sales Managers and Leadership

• Organizations needing structured sales tracking

## Deployment Model

• On-premise or cloud-hosted

• Web-based CRM application

• Centralized backend database

• Role-based access for users and administrators

## Summary

HERMIS CRM is a focused and practical CRM solution designed to manage leads, sales activities, booking plans, marketing campaigns, and customer data with clarity and control. With strong reporting and dashboard capabilities, it empowers sales teams and leadership to track performance, plan effectively, and drive consistent business growth