

saelos.

SALES + CRM

WELCOME

Introducing Saelos.

SALES ENABLEMENT

Your time is best spent on the opportunities most likely to end in a sale. You should never lose valuable time chasing every stray lead. You need a platform that identifies quality relationships and makes your job easier. Saelos enables you to sell more and work less.

RELATIONSHIP MANAGEMENT

Managing relationships is critical and we believe you shouldn't have to fight with a piece of software to be able to connect to people. Saelos does the work for you, providing you the information you need, when you need it, letting you focus on the person instead of the data.



LEADS + CONTACTS

Contacts.

MANAGE ALL YOUR RELATIONSHIPS.

You don't look at people differently when you're speaking with them, so why should you classify them differently in your management platform?

Saelos considers every relationship equal while still allowing you the ability to mark status, tag, and differentiate on any factor you want.

Evie Daniels

10 HOURS AGO

Dare-Armstrong Inc.

Discovery Call Booked

Amazing

x



Company Details

▼ **Contacts (3)**

[+ Add](#)

Evie Daniels

3 DAYS AGO

CEO at Dare-Armstrong Inc

Andrew Balboa

9 DAYS AGO

CMO at Dare-Armstrong Inc

▼ **Tasks (0)**

[+ Add](#)

▼ **Opportunities (1)**

[+ Add](#)

Davidson Oil Proposal

INITIAL RFP

Dare-Armstrong Inc

▼ **Notes (6)**

DB Hurley



Add your note here.

ACCOUNT MANAGEMENT

Companies.

**YOUR ACCOUNT
KNOWLEDGE LINKED.**

You shouldn't have to hunt for information related to your contacts and their companies. You should be able to find contacts, opportunities, tasks and notes related to an account with zero clicks. Add a new note, link a new contact, link an opportunity easily and quickly.

ACCOUNT DATA CENTRALIZED

TRACK YOUR DEALS

Opportunities.

YOUR PIPELINE AND POTENTIALS.

You want to know what your sales pipeline looks like and what deals you have getting close to closing. You need that information presented in a convenient and meaningful way. You should be able to sort your opportunities by stage, value, and any other factor you desire.

Opportunity Outcome

\$1,200

EST 7 DAYS TO CLOSE



NEXT STAGE

Scope of Work (75%)

CALLS + EMAIL + SMS

Activities.

STAY CONNECTED ON ANY CHANNEL.

Omni-channel is the wrong way to think about your interactions. You're sharing an experience with your contact. As a result you should be able to talk to your relationships anywhere. And at any time. And you should also be able to schedule those experiences and activities.

Create Task for Evie Daniels

Assignee

DB Hurley

Type

Call

Due Date

04/20/2018

Name

Enter your task name

Task Details

Normal

**B***I*U¹²³

Create

Cancel

Opportunity

Select

CONTACTS + COMPANIES + OPPORTUNITIES

History.

TRACK WHAT HAPPENED AND WHEN.

You shouldn't have to remember every detail from every relationship as they change. Because they do change, constantly. Saelos enables you to remember the past with perfect recall. See what changed, and when. You can even check on who changed the information.



History

Assigned to 1st Attempt

10 HOURS AGO

DB Hurley changed the status to 1st Attempt (from Discovery Call Booked)

Call Evie Daniels Next Week

3 DAYS AGO

Remember to call Evie and discuss the details for the call scheduled for next Tues.

Assigned to Discover Call

8 DAYS AGO

DB Hurley changed the status to Discover Call (from Initial Interest Form)

Send First Pass Email

11 DAYS AGO

Send an introductory email for Evie to test interest in a discovery call.

Assigned to Cold Calls

15 DAYS AGO

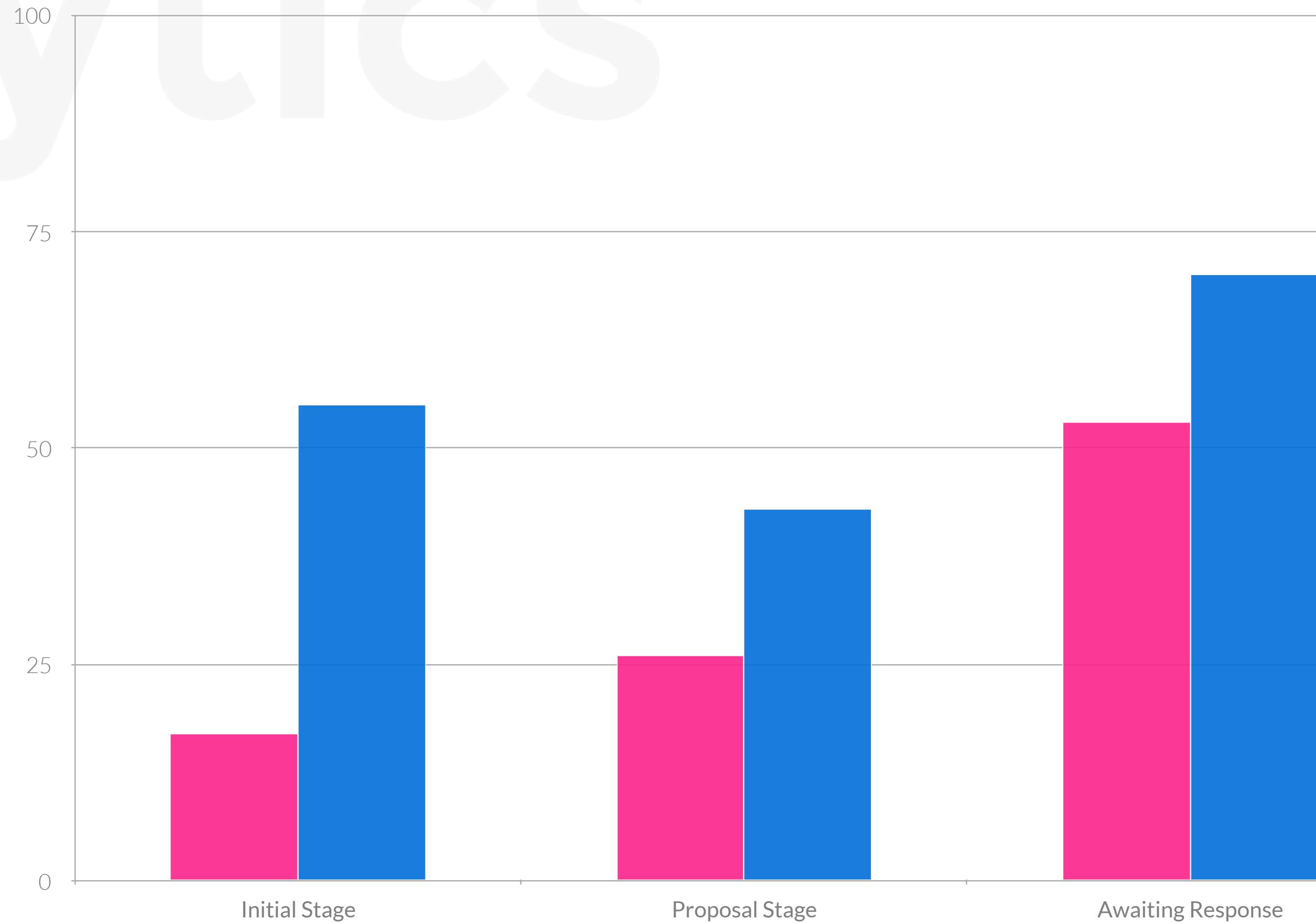
DB Hurley changed the status to Cold Calls (from Marketing Automation Lead)

PIPELINE + REP ACTIVITY

Analytics.

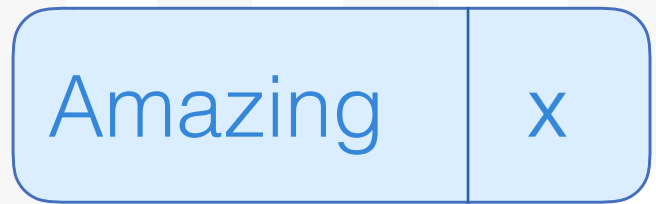
**SEE STATUS + PROGRESS
AT A GLANCE**

Everyone loves a pretty chart. But you need more than a pretty chart, you need relevant data. Saelos gives you both: a beautiful, easy-to-copy chart packed with the information that is most valuable to you. See all opportunities grouped by the stage they are in as well as all the activity of your team in one minimal graph.



DEEP DIVE




Tagging



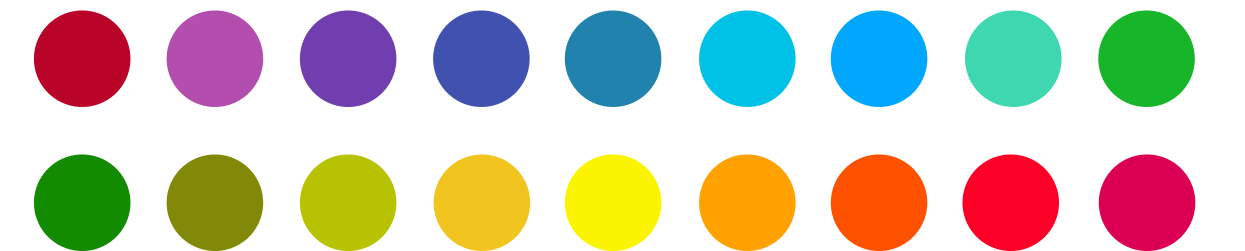
**LABELS, FOLDERS,
WHATEVER YOU NEED.**

You may want to add a tag to information so you can find it quickly; or you may want to tag things to organize them in a folder view. However you need to extend Saelos, tagging gives you the power and flexibility to do so. Infinite, flexible organization is within your grasp.

+ ADD TAG

-  Probably
-  Interesting
-  Newly Entered

Create New Tag



Create

Give Evie Daniels A Call

Amazing x

Remember, when speaking with Evie to focus on the upcoming deadline for the initial proposal that we've sent her.



Call

Click the button to the left to initiate a call to this user. Once the call is completed please enter your Rep Sentiment Score below.

SCORE

Rep Sentiment Score



Opportunity

Select ▼

TRACK YOUR PROGRESS

VECTOR.

Sometimes it just helps to know how you're doing across everything. Your VECTOR gives you insight into how well you're doing across several key areas.

[Volume, Email, Calls, Team, Opportunities, and Responses]

GET THINGS DONE

Headquarters.

You need a place to go every day. One screen to give you instant access to the tasks you need to complete, the people with whom you need to connect and the opportunities to pursue.

> Volume (57%)

> Email (78%)

∨ Calls (37%)

Your call volume in this quarter is significantly under your quota levels. There are **23 contacts** assigned to you who prefer phone calls and have outstanding activities or have a status that may be ready to be updated.

> Team (41%)

CONTACTS + COMPANIES + OPPORTUNITIES

Fields.

CREATE EXACTLY WHAT YOU NEED.

Your software should track the information that matters to your business. Rather than conforming to a system; use a system that forms to you.

Saelos' custom fields gives you the flexibility to enter the information on your relationships that you care about.

NAME

OBJECT

REQUIRED?

SAVE PERSONALIZED FILTERS

Custom Views.

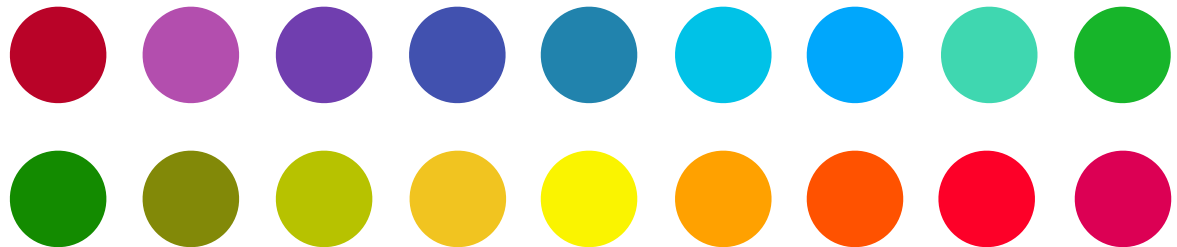
SEE WHAT YOU WANT HOW YOU WANT.

You should see the people, companies, and opportunities you want immediately. You shouldn't have to create an advanced report view just to have the right list. Saelos allows you to create dynamic, custom views filtered just the way you want. And you can save them forever.

Assignee: Me x Status: Cold x +

Create New View

View Name



Create