GleanView

Innovative Cloud-Based Software Company Focused on Empowering Manufacturing Sales and Marketing

Imagine being able to predict your customers' needs and market changes to create response strategies in advance. Only an effective CRM provides this ability by streamlining management of multi-channel sales and marketing systems, giving your sales leaders control over their entire customer ecosystem. Reduce your costs and increase efficiency with GleanView, a CRM built for manufacturers handling independent sales reps, dealers/partners, and direct customer relationships. With a manufacturer-focused CRM, you can track pipelines, manage multi-channel sales, enhance prospecting and upsell efforts, and implement predictive sales strategies.

CRM FOR MANUFACTURING

BENEFITS

Multi-Channel Collaboration

A dynamic manufacturing CRM allows for all members of the team to be informed of data relating to each account and customer. In GleanView, your sales, marketing, customer service, and support teams have the ability to see data at a glance, viewing all prior communications, so there is no question of when the customer was contacted last. This also allows the team to see the flow of communication from first contact to final sale or service. Manufacturers can deal directly with partners for coordinated sales and distribution.

Lead Distribution

Intelligently distribute leads to partners and sales teams automatically, based on sets of customizable rules. Connect your website forms to GleanView, and the form lead information collected will be converted into new accounts on the spot. This increases the efficiency of your partners and sales teams by routing them qualified leads to follow up on and gives the marketing team an advantage regarding which channels produce more qualified leads.

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Marketing & Communication

Segment your accounts and contacts to create campaigns targeting specific communication to your partners or direct customers. Increase partner engagement with customers by providing branded marketing campaigns, and use automation to get the right message out to your customers at the right time. Create marketing campaigns for new leads, and close more sales by using targeted campaigns to get your message heard.

Analytics

Easily view how your partners are performing on orders and engagement. Compare partner performance across multiple key performance indicators (KPIs) such as account creation, opportunities, phone calls, emails sent, closed sales, and more. Click through each KPI for a quick view of specifics on sales numbers, phone time, and scheduled events. Use the same analytics to compare how your sales teams are stacking up against one another in real time to see where improvements can be made and set sales goals to help boost Sales Team metrics.

ERP Integrations

Focus on driving new business rather than on the hassles of making data available. Integrating your ERP with GleanView CRM gives you a 360-degree view of your customers and partners by providing a complete look into your customers' needs, buying habits, order histories, account standings, and more. This puts all of your customer and partner information in one place for your sales or call center representatives to get what they need right when they need it. Integrating with your ERP will also improve efficiency and cut down on duplicate data-entry tasks.
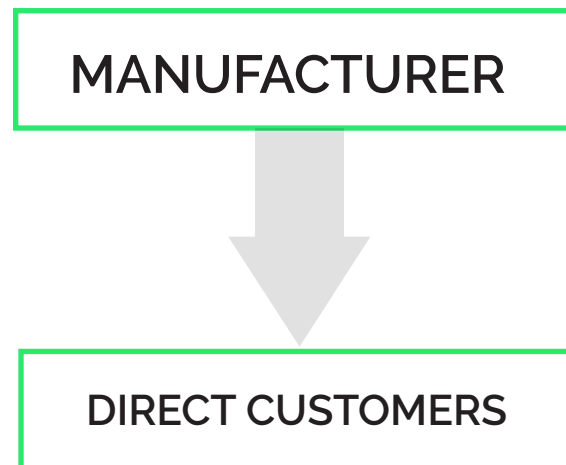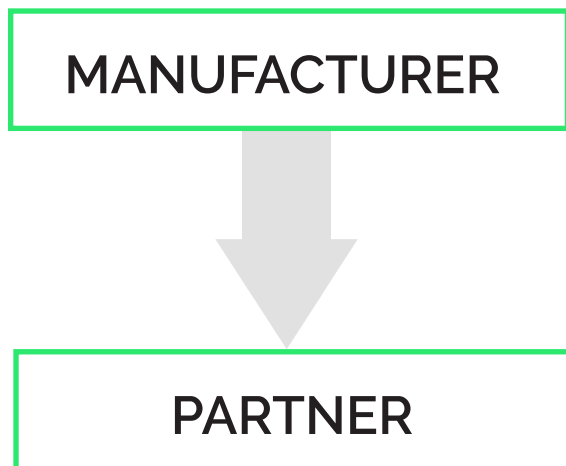
Calendar & Real-Time Notifications

Stay organized and focused on moving customers through your customizable sales pipeline with full calendar functionality and real-time notifications of upcoming events as well as website visits from your contacts. Schedule meetings with ease by seeing shared calendars, create follow-up events based on successful lead communication, contact leads immediately after they have visited your website, and customize the message based on their recent activity on your website.

75% of manufacturing companies are using multiple platforms for sales, marketing, and customer service.

* CRM for Manufacturers Research Study, Manufacturing.net, March, 2016.

GleanView combines all your Sales & Marketing needs into one platform

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Partner Management

- **Partner Recruiting & Onboarding**

  Manage new partner recruiting pipelines, track effectiveness of new partner recruiting programs, and route new partner leads based on customizable assignment rules.

- **Lead Distribution**

  Leads can be routed automatically to specific partners who can then update and manage the leads in a shared system, so manufacturers can track and gauge partner effectiveness.

- **Account Management**

  Track detailed partner account contacts, opportunities, and histories including call notes, emails, website visit history, campaigns, and quotes. Get real-time notifications when known contacts visit the manufacturer's website.

- **Marketing Automation**

  Create beautiful email campaigns with drag-and-drop builders, use advanced segmenting and reporting for effective campaigns, and schedule social media posts right from GleanView.

- **Advanced Analytics**

  Analyze sales and activity to easily compare performance of individual partners or groups of partners. View partner pipelines to increase forecast and demand accuracy.

Manufacturing CRM

- **Account & Contact Management**

  View detailed account data including contacts, opportunities, and histories including call notes, emails, website visit history, campaigns, and quotes. Advanced calendar and task notifications mean you never miss a follow-up with a contact.

- **Lead Management**

  Distribute and track incoming leads using customizable sets of rules, track sales team conversion rates, and receive real-time notifications when leads visit your website.

- **Pipeline Management**

  Easily view sales team pipeline information to see where opportunities can be converted into projects. Track project stages and shipping information at a glance.

- **Marketing Automation**

  Create and A/B test email campaigns and landing pages with drag-and-drop builders, use advanced segmenting and reporting for effective campaigns, and schedule social media posts right from GleanView to platforms like Facebook, LinkedIn, and Twitter.

- **Account & Sales Team Analytics**

  Analyze customer metrics like last order date, total orders, last contact, phone calls , and more. Examine sales team leaderboards for key performance metrics like phone calls, emails, new accounts, and sales to compare individuals or team average performances.

About GleanView

GleanView's CRM for Sales and Marketing is a complete solution for managing customer relationships. Our product combines Account Management, Email/Digital Marketing, and Advanced Analytics into one powerful, cloud-based platform. Every single customer detail is logged into one central customer database. GleanView enables your team to easily transform this information into deep analytics and insights and equips them with tools and automations needed to turn these insights into valuable customer relationships.

Ready to take GleanView for a test drive?

TRY IT FOR FREE