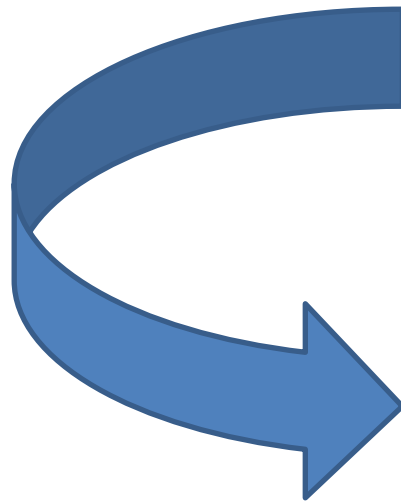


In December 2018, FINELIS decided to propose a new offering for SALES SUPPORT centred around the CRM and focused on the best of the 2 worlds: Sales enablement and Operations.



*THE DIGITAL CRM SERVICE OFFERING*

*BY*

*FINELIS SAAS (SALES AS A SERVICE)*

- Managing dynamically data and systems such as the CRM (*if no CRM, FINELIS helps for CRM selection and setup*)
- Automation of the CRM and marketing-related tools.
- Communicating with the sales staff (*CRM access and process discipline for all sales and marketing managers*)
- Helping to engage customers and prospects
- Sales forecasting and reporting

➤ **Appendix: 3 Print Screens Pipedrive**

○ **CLIENT FINELIS Pipeline**

The screenshot displays the Pipedrive CRM interface for a pipeline named 'Ariadne Pipelin...'. The pipeline stages are: Lead In, Contact ..., Project o..., Feedbac..., Deal Qua..., Interest f..., Face to f..., Proposal ..., Less tha..., less than..., Pre-valid..., Negotiat..., and Contract. An 'Add deal' button is visible at the top left. An 'Edit stage' modal is open, showing the configuration for the 'Feedback obtained' stage. The modal includes a text input for the stage name, a numeric input for deal probability (set to 20%), and radio buttons for deal 'rotting' (set to Off). Buttons for 'Save', 'Cancel', and 'Delete this stage' are at the bottom of the modal. A blue arrow points from the 'Feedback obtained' stage in the pipeline to the 'Edit stage' modal.

**Edit stage**

Stage name: Feedback obtained

Deal probability: 20 % (0...100)

Deal "rotting":  On  Off

[Save](#) [Cancel](#) [Delete this stage](#)

Please bear in mind that sales stages will be shared with all users throughout your company.

- Available permissions available per CLIENT user (up to 19 features are available for CLIENT if need):

**Permissions**

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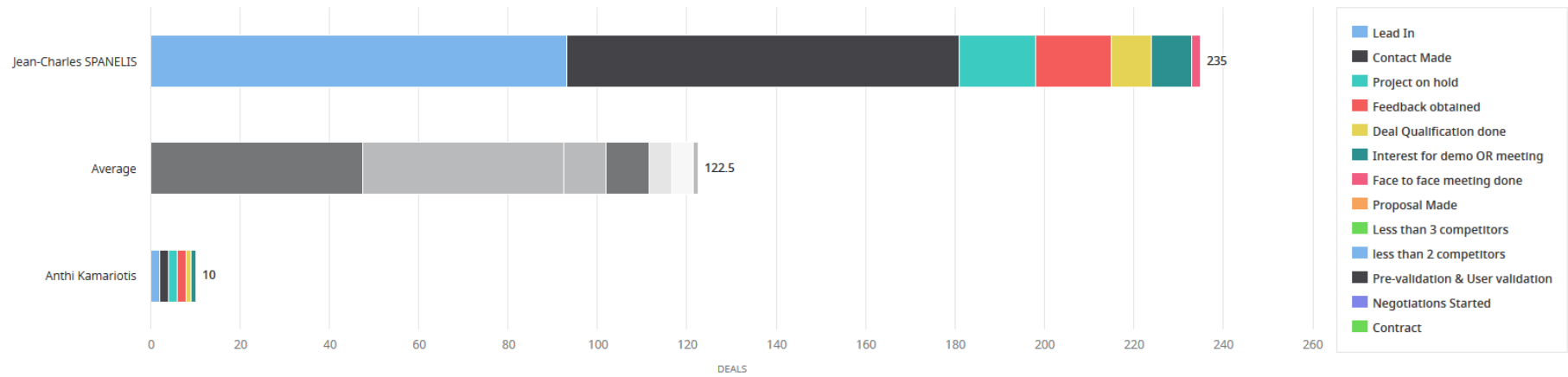
- Change the visibility of items
- See the names of hidden items
- Export data from item lists
- Delete deals
- Delete activities
- See company's statistics
- See other users' statistics
- See other users
- See the summary on the Deals page
- See all items of other users they are following
- Merge deals
- Merge people
- Merge organizations
- Share filters
- Edit shared filters
- Edit deals won/lost date
- Bulk edit items
- Use API
- Import items

○ FINELIS statistics & dynamics reports:

How are deals progressing? ?

by Stages | by Stages over time | **by Users** | by Users over time

Count | Value



User	Lead In	Contact Made	Project on hold	Feedback obtained	Deal Qualification done	Interest for demo OR meeting	Face to face meeting done	Proposal Made	Less than 3 competitors	less than 2 competitors	Pre-validation & User validation	Negotiations Started	Contract
<b>Everyone</b>	<b>95</b>	<b>90</b>	<b>19</b>	<b>19</b>	<b>10</b>	<b>10</b>	<b>2</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Jean-Charles SPANELIS	93	88	17	17	9	9	2	0	0	0	0	0	0
<b>Average</b>	<b>47.5</b>	<b>45</b>	<b>9.5</b>	<b>9.5</b>	<b>5</b>	<b>5</b>	<b>1</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
Anthi Kamariotis	2	2	2	2	1	1	0	0	0	0	0	0	0