

V-Desk CRM

Digital information centre

Management of customer relationship from first contact to long-term cooperation. A cutting-edge application for sales teams to store data and manage information. An intuitive tool for planning and supervising work progress and evaluating sales opportunities.

Key CRM functionalities in V-Desk



Database of customers

Easy registration of all customers allows you to collect and update information in one place. Integration with your email inbox and automatic data retrieval from the Central Statistical Office (GUS) by tax identification number (NIP) significantly speeds up the process, minimising the risk of errors.

Regular contact with customers

Comprehensive support in planning sales activities such as meetings, calls and demonstrations. A user-friendly calendar with reminders and follow-up tasks facilitates regular customer contact and ensures continuity of cooperation.

Customer relationship overview

Full record of all events (meetings, demonstrations, demo send-outs) and documents (offers, contracts) linked to every customer, providing complete transparency and easy access to previous agreements, as well as the ability to efficiently monitor the entire business relationship.

Lead management

Effectively guide potential customers through the sales process with the help of qualifying leads using labels. Easy and fast full-text and indexing search saves time.

Efficiency in everyday work thanks to advanced tools

A set of tools helps to build lasting relationships with contractors, providing access to information, quick assessment and contact planning.

Integration with your email inbox to register a new contact (lead) from an email.

Search filters, both full-text and by specified parameters.

Dictionary management and configuration.

Lead qualification using labels, value assessment (scoring).

Management and control of **permissions and access.**

Analysis and reporting with embedded **Power BI.**

Use of the V-Desk CRM application in the sales process

Sales funnel optimisation

Access to the right information increases the accuracy of contact potential assessment and directs focus to the most promising opportunities.

Access to an organised database

A clear and organised record of planned and completed contacts allows you to maintain relationships, target marketing communications effectively and personalise offers.

Monitoring sales department activity

The overview of contact history enhances the regularity of sales activity planning and the analysis of its fulfilment.

Long-lasting customer relationships give you a strong competitive advantage. Building and nurturing them with the use of V-Desk CRM application brings tangible results. This is facilitated by a set of tools that provide access to well-organised information about customers, events and current offers.