



ProductDossier[®]

Project Management First

TouchBase Opportunity Management

TouchBase

Opportunity Management

- 1 The world of opportunities
 - 2 Key Challenges
 - 3 Lost Opportunities
 - 4 TouchBase Capabilities
 - 5 TouchBase Differentiators
 - 6 TouchBase Business Value
 - 7 TouchBase Modules
 - 8 TouchBase Glimpses
- 

The world of opportunities.

Advancements in technology enable organizations to explore business opportunities globally.

Technology has also made customers extremely knowledgeable that they call the shots, hunt down what and when they want it and finally getting it delivered.

Service providers must anticipate their clients' next moves and position themselves in shoppers' paths as they try to navigate the decision journey from consideration to purchase.

Customer loyalty along with the decision journey has significantly changed in favor of the consumer.



Opportunity Management

Key Challenges

1

Sloppy and time-consuming estimates and proposals.

2

Proposals are unstructured, incomprehensive, & lack rigor.

3

Documentation on spreadsheets, documents, emails, etc.

4

Lack of seamless stakeholder collaboration.

5

Ad hoc opportunity tracking.

6

Unable to manage customer accounts holistically.

7

Cumbersome partners management.

Opportunity Management

Lost opportunities

High cost of proposal management.



Delayed and ineffective proposal pursuit.

Poor quality of decision-making.



Defocused customer account management.

Unenthusiastic partner network.



Reduced revenue and profitability.

TouchBase

Opportunity Management Capabilities

Extremely configurable solution to –

- Your industry
- Your products & services
- Your lead and proposal management standards, processes and workflows.
- Templates, forms, checklists, etc.

Account & Customer Management

- Multiple accounts
- Multiple customers within an account
- Contacts database for each account customer

Sales Team Management

- Define sales team and roles
- Track performance of sales executives

Lead Management

- Configure Lead form
- Create leads
- Qualify leads
- Seamlessly convert lead into opportunity

Opportunity Management

- Configure Opportunity form
- Manage opportunity life cycle
- Track opportunity status, probability, and result.

Cost Sheets

- Create configurable cost sheets
- Track elements – manpower, machine etc.
- Track cost sheet revisions
- Create and track budgets & profitability

Marketing Campaigns

- Create campaigns/events
- Track leads and opportunities by event

Partner Management

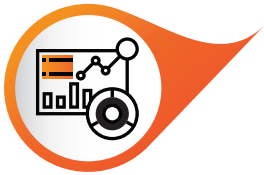
- Create partners
- Track all partners
- Track opportunities by partners

TouchBase

Common Capabilities



Analytics



Dashboards



Alerts & Notifications



Social Collaboration



Mobile Access

TouchBase System Integrations



TouchBase Differentiators

1 *Designed for “your” industry, project type, project approach, methodology, and business processes*

2 *An end-to-end solution that addresses all the dimensions of opportunity management*

3 *Seamless integration with other enterprise applications*

4 *95% configurable; less than 5% customization*

5 *Completely digitized project landscape*

TouchBase Business Value

- 1 Comprehensive account & customer management
- 2 Smooth and seamless lead management.
- 3 Robust opportunity management.
- 4 Effective sales team management.
- 5 Optimize marketing campaigns.
- 6 Efficient partner management.
- 7 Data-driven decision-making.
- 8 Facilitate smooth and instant collaboration.

TouchBase Modules



Opportunity Management



Project Management



Project Financials Management



Project Resources Management



New Product Development



Timesheets & Leave Management



Project Quality



Project Procurement



Project Documentation



Social Collaboration



Utilities

TouchBase Glimpses

Opportunity List

No Filters are selected. Filter

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S. No. #	Opportunity No. #	Title #	Customer Name #	Primary Sales Manager #	Status #	Received Date #	Expected Closure Date #	Result	Actions
1	OP000353	IT Test Opportunity	Citigroup (C0007)	John Hopkins	In Progress	24-07-2019		Win	
2	OP000352	Test Data	Bank of America (C0)	John Hopkins	Completed	24-07-2019		Win	
3	OP000350	Power Transmission	Ford Motor Company	John Hopkins		03-08-2020			
4	OP000349	Software Development	Bank of America (C0)	John Hopkins	In Progress	24-07-2019	26-08-2020	Win	
5	OP000346	Air Filter System	Ford Motor Company (C000)	John Hopkins		01-09-2020	04-09-2020	Win	
6	OP000343	Automotive Part 01	Ford Motor Company	John Hopkins		01-06-2020	30-06-2020	Win	
7	OP000342	Program 01	Ford Motor Company	John Hopkins		17-08-2020	31-08-2020	Win	
8	OP000337	Test Opp - Proposal L	Citigroup (C0007)	PD Server Admin	In Progress	24-07-2019			
9	OP000332	Anti-Fraud System	Citigroup (C0007)	John Hopkins	In Progress	24-07-2019	02-08-2020	Win	
10	OP000326	Clutch Pad Develop	Ford Motor Company	John Hopkins		01-07-2020			

Opportunity Analytics





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TouchBase is ready
to empower your
teams deliver the right
opportunities for
maximum business value.
Are You?