



Introducing

UMBRELLA

Customer Relationship
Management (CRM)
System

www.opus-bd.com



Elevate your customer interactions with **Umbrella CRM** module. From lead management to customer retention, this system helps you build strong relationships, track customer interactions, and drive sales growth.

Umbrella | **CRM**

About Us

OPUS, established in 2012, specializes in ERP systems and financial software, including custom software development, mobile apps, and web development. Known for innovation, the company focuses on delivering world-class, tailor-made software solutions globally, aiming to transform digital workplaces and achieve global recognition in the IT sector. OPUS combines cutting-edge technology with expert development to address diverse business needs and digital transformation challenges.



Umbrella | CRM

WHY A BUSINESS NEEDS
**CUSTOMER
RELATIONSHIP
MANAGEMENT (CRM)
SYSTEM?**



15-20%

increase in customer retention

10-15%

improvement in sales conversion rates

25-30%

reduction in customer service costs

5-10%

increase in overall revenue

Umbrella | CRM

WHAT
UMBRELLA CRM
CAN DO FOR
YOU?





**Enhanced
Customer
Satisfaction**



**Boosted
Sales**



**Data-Driven
Decisions**



**Improved
Efficiency**

Umbrella | CRM

CORE MODULES OF
UMBRELLA CRM





**Customer
Database**



**Contact
Management**



**Lead & Opportunity
Management**



**Sales
Automation**



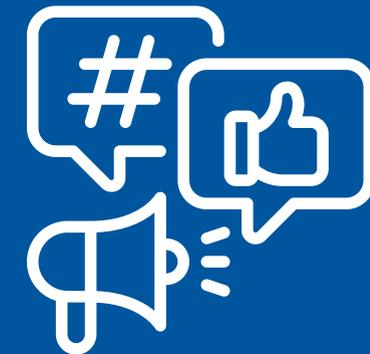
**Marketing
Automation**



**Customer Service
and Support**



**Interaction
History**



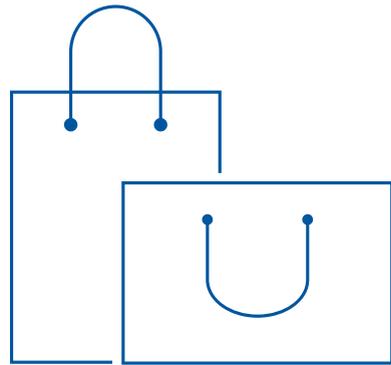
**Social Media
Integration**



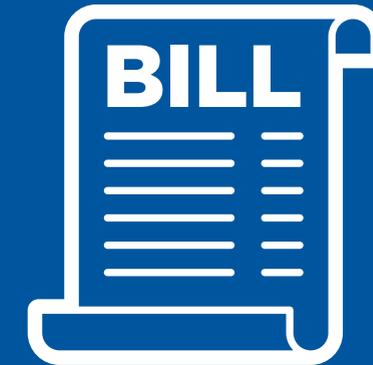
Customer Feedback and Surveys



Customer Loyalty Programs



E-commerce Integration



Billing and Invoicing



Reporting and Analytics



User Authentication and Access Control

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DIVE INTO
UMBRELLA CRM
MODULES
DETAILS





MODULES

Customer Database

- Centralized database of customer information
- Contact details, demographics, and company information
- Record of interactions and transactions



MODULES

Contact Management

- Tracking and managing customer contacts
- Communication history (calls, emails, meetings)
- Customer segmentation based on various criteria



MODULES

Lead and Opportunity Management

- Lead capture and qualification
- Opportunity tracking and forecasting
- Sales pipeline management



MODULES

Sales Automation

- Automated sales processes and workflows
- Quote and proposal generation
- Order processing and tracking



MODULES

Marketing Automation

- Campaign management and automation
- Email marketing and tracking
- Lead nurturing and scoring



MODULES

Customer Service and Support

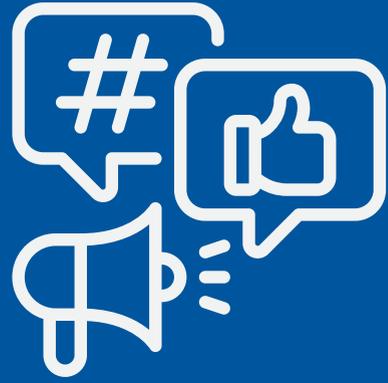
- Ticketing system for customer inquiries and issues
- Knowledge base for self-service support
- Service-level agreements (SLAs) tracking



MODULES

Interaction History

- Comprehensive history of customer interactions
- Notes, logs, and attachments related to customer communications
- Timeline view of customer engagement



MODULES

Social Media Integration

- Monitoring and engagement on social media platforms
- Integration with social media for customer insights
- Social listening for brand mentions



MODULES

Customer Feedback and Surveys

- Collection of feedback through surveys
- Net Promoter Score (NPS) tracking
- Analysis of customer sentiment



MODULES

Customer Loyalty Programs

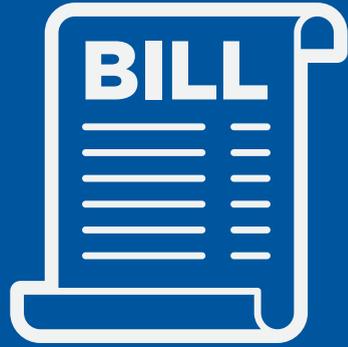
- Management of loyalty programs
- Points tracking and rewards management
- Segmentation based on customer loyalty levels



MODULES

E-commerce Integration

- Integration with online shopping platforms
- Order tracking and customer account management
- Real-time synchronization of customer data



MODULES

Billing and Invoicing

- Billing system integration for accurate invoicing
- Tracking of payment history and outstanding balances
- Automation of billing processes



MODULES

Reporting and Analytics

- Dashboards for real-time insights
- Reports on sales performance, customer satisfaction, and marketing effectiveness
- Customizable reports for specific business needs



MODULES

User Authentication and Access Control

- User accounts for authentication
- Role-based access control for security
- Limited access for specific user roles



ADVANTAGES OF PARTNERING WITH US . . .





**Customizable
Module**



**One Decade
Experience**



**Advanced Data
Security**



**Dedicated
Support**

They Trust on UMBRELLA CRM



They Trust on UMBRELLA CRM



Agrani Bank Limited





Dubai Office

Business Center 1, M Floor
The Meydan Hotel, Nad Al Sheba
Dubai, U.A.E

Bangladesh Office

Khan Tower (2nd Floor) 80/3,
VIP Road, Kakrail,
Dhaka, Bangladesh.

Malaysia Office

No 705, Level 7, Tower 2, Wangsa 118
Jalan Wangsa Delima Wangsa Maju
Kuala Lumpur, Malaysia



Thank You
For Your Attention



Visit Our Website
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