Sales **Management**

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The right data for the right decision

Adapt allows your sales team to easily control leads, prospects, and customer relationships through opportunity tracking, contact management, and performance management metrics. Account managers save time with the ability to find, organize, and view critical information at the click of a button, as Adapt eliminates mundane tasks.

Contact Management

- Email contacts with the click of a button through Outlook integration
- Create custom contact reports
- Quickly review client account information
- View client journals to see who else has worked on each account and all the activities related to that record
- Utilize sophisticated contact searching

Sales Analysis

- Key Performance Indicator Reports
- Sales Activity Reports
- Real-time Customizable Dashboards

Tracking Opportunities

- Track opportunities against each client with organizational charts
- Utilize forecasting reports
- Set follow up reminders
- Visually analyze the sales pipeline

Tracking Leads

- Quickly create leads
- Tag e-mails from Outlook to your lead with a click of a button
- Organize and manage leads through to the client stage