

## THE CHALLENGE

Though identifying, capturing, and monitoring new business opportunities is of paramount importance for the growth and profitability of a company, too many Small and Midsize Enterprises are still -

- working with manual and labor-intensive spread sheet solutions,
- investing too much money in complex CRM solutions, when only a fraction of the functionality is needed, and
- doing reverse engineering of opportunity data to reconcile revenue and forecasts with actual numbers.

## SOLUTION

Shibui-IT™ Opportunity Tracking Tool (SOT²) is a web-based and cost-effective software tool to replaces complex and expensive CRM solutions as well as manual and labor-intensive spread sheet solutions. It tracks and monitors each new opportunity or socket from the concept phase to production start.

### List of key SOT² Features

Administration	<ul style="list-style-type: none"> <li>• User rights to read and write data - Option to delegate User rights</li> <li>• Assign ownership to Customer, Opportunities and Sockets</li> <li>• Establish account hierarchies with defined access rights</li> </ul>
Funnel Management	<ul style="list-style-type: none"> <li>• Overview of unit and value impact by product and customer for each opportunity &amp; socket/application</li> <li>• Both the last change made by the user and the time of change are recorded.</li> </ul>
Master Data	<ul style="list-style-type: none"> <li>• Master Data used at each opportunity and socket describing the state of business</li> <li>• User defined values describing customers, products, and opportunities</li> </ul>
Project Revenues	<ul style="list-style-type: none"> <li>• The opportunities and their bases contain the variable data information to determine the expected project revenues.</li> <li>• A self-explanatory input menu helps to understand what information/data are required</li> </ul>
Reporting	<ul style="list-style-type: none"> <li>• Focus on overview reports without detailed analysis</li> <li>• Export to Excel functionality</li> <li>• Comprehensive analysis can be performed by several Shibui-IT™ applications when SOT² is linked to Shibui-IT™ BI</li> </ul>

## WHY SOT²?

- This product was designed and developed by users for users. It is the result of decades of business experience, from the C-suite level through sales and marketing to operational functions, complemented by customer feedback from various market segments.
- Is a cost-optimized CRM solution to complement any ERP system. The one-time investment will be about five days of consulting costs for the activation and training of approx. ten users. No license fees required.
- Provides a SOT² proof of concept with a large amount of fictitious, yet realistic, opportunity data that can be tested online to facilitate buying decision.
- Reduces the administrative efforts for users to a minimum while providing all required tracking and monitoring information.
- Has a clear, well-designed, and intuitive user interface for data entry without using the tutorial.