



# PROSPERWORKS

# EXTENDED PROFILE



**PROSPERWORKS**

## OVERVIEW

ProsperWorks caters to businesses of all sizes, delivering tools to contain all aspects of the customer relationship process in a single platform.

Designed from the ground up to integrate with Google apps, ProsperWorks is suited for companies who already contain much of their workload within Google products. As a result of this focus, ProsperWorks positions itself as a universal CRM capable of being adapted to any business, reducing complexity and streamlining the user experience to improve productivity.

As the only CRM recommended by Google, ProsperWorks bolsters this relationship by providing a purpose-built Gmail Chrome Extension along with full integration of all Google Apps, ensuring users experience the most efficient platform bringing together their current systems into an easily navigable format. ProsperWorks automates customer research and eliminates painful data entry through data capture and tracking systems, which, along with Google apps integration aim to make processes simple, visible and actionable.

With a Mobile Suite across iOS and Android, including mobile and tablet optimization, ProsperWorks is a cloud-based system with a three-tier pricing structure aimed at small teams, growing businesses, and large companies respectively.

## FEATURE OVERVIEW

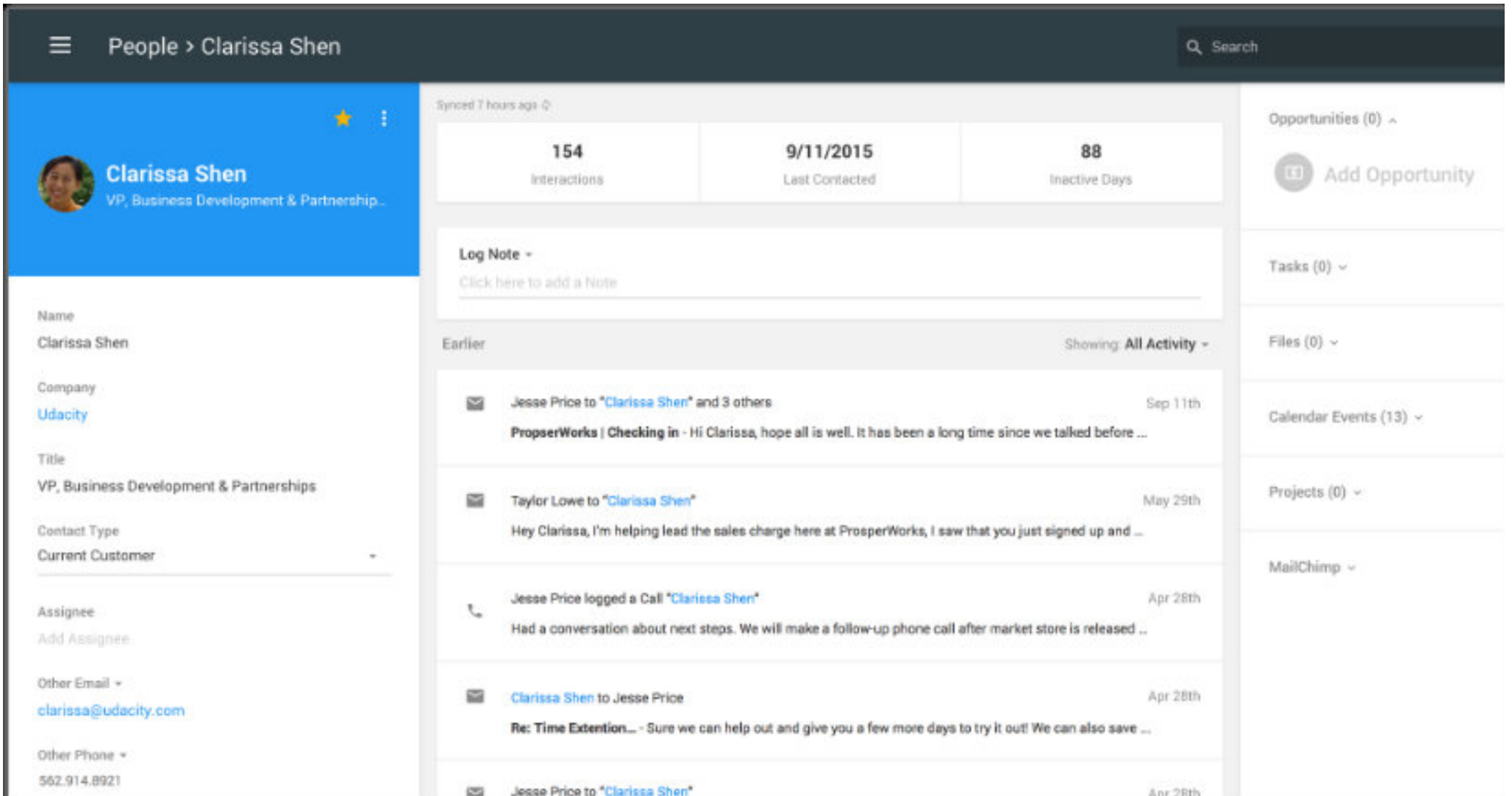


## SOFTWARE SPECIFICATION

OVERVIEW	
PRODUCT NAME	ProsperWorks
SOFTWARE FEATURES	
API ACCESS	✓
CADENCE	✗
CONTACT MANAGEMENT	✓
CONTRACT MANAGEMENT	✗
DATABASE MANAGEMENT	✓
FUNNEL REPORTING	✓
INTEGRATIONS	✓
PARTNER TRACKING	✗
PERFORMANCE REPORTING	✓
PIPELINE MANAGEMENT	✓
PRODUCT & PRICE CONTROL	✗
SALES GAMIFICATION	✗
QUOTATION HANDLING	✗

TASK ASSIGNMENT	✓
TERRITORY/QUOTA MANAGEMENT	✗
<b>CUSTOMER SIZE</b>	
SMALL (1-50 USERS)	✓
MEDIUM (51-200 USERS)	✓
ENTERPRISE (201+ USERS)	✓
<b>OTHER FEATURES</b>	
MULTIPLE LOCATIONS	✗
MULTIPLE CURRENCY	✗
CUSTOMIZABLE	✓
<b>HOSTING METHOD</b>	
CLOUD	✓
ON-PREMISE	✗
<b>FURTHER INFORMATION</b>	
PRICING	\$19/user/month. *Paid annually. Up to 5 users

## SOFTWARE SCREENSHOTS



The screenshot displays the ProsperWorks CRM interface for a contact named Clarissa Shen. The interface is divided into several sections:

- Header:** "People > Clarissa Shen" with a search bar on the right.
- Contact Profile (Left Panel):**
  - Name:** Clarissa Shen
  - Company:** Udacity
  - Title:** VP, Business Development & Partnerships
  - Contact Type:** Current Customer
  - Assignee:** Add Assignee
  - Other Email:** clarissa@udacity.com
  - Other Phone:** 562.914.8921
- Summary (Top Middle):**
  - Synced 7 hours ago
  - 154 Interactions**
  - 9/11/2015 Last Contacted**
  - 88 Inactive Days**
- Log Note (Middle):** A section for logging notes with a "Click here to add a Note" link.
- Activity Feed (Bottom Middle):** A list of activities showing interactions with other contacts like Jesse Price and Taylor Lowe, including dates and brief descriptions of the interactions.
- Right Panel (Action Items):**
  - Opportunities (0):** Add Opportunity button
  - Tasks (0)**
  - Files (0)**
  - Calendar Events (13)**
  - Projects (0)**
  - MailChimp**

**Company Dashboard** | Search | + | 18

Sales - **\$76,058** Today | Showing All Activity - From Everyone - My Tasks

Recently Contacted Companies -

Recently Contacted People -

Pipeline Summary  
**\$47.2K Total Value** 270 Opportunities

Sales Forecast  
**\$101K Forecast**

Activity Log:

- 2:13 PM Jesse Price logged a Phone Call - "Charles Davidson" Connected and scheduled next step.
- 2:10 PM Andrew Lobo logged a Phone Call - "Nikola Chiriac" Conversation with Belinda went well. Follow-up next week.
- 2:09 PM Andrew Lobo logged a Phone Call - "Darcy Zart" Reached back out. Going to talk with him tomorrow again.
- 2:01 PM Munjal Shah added the Opportunity - "CinqueWorks"
- 1:45 PM Kyle Van der Linde added the Opportunity - "ContextLo"
  - Bret Orlam logged a Phone Call - "Jason Kwan" Had a positive response. will follow up later today.
- 1:23 PM Jack James added the Opportunity - "Splish"
- 1:10 PM Jesse Price logged a Phone Call - "Maq Dis" Texted back. No questions currently.

My Tasks

- Download ProsperWorks Mobile App ProsperWorks | mason

My Favorite Opportunities -

- 500 Keyboards (sample) Stage: Follow-up \$50,000
- 25 Office Chair Stage: Contract Sent \$75,000
- 8 New Copy Machines Stage: Qualified \$250,000

**Sales** | Open Opportunities (32) | \$1,149,008 | **40% New**

PROSPECTING \$36,000 | QUALIFIED \$100,000 | **NEEDS IDENTIFIED \$111,000** | FOLLOW UP \$160,000 | PRESENTATION \$50,000 | CONTRACT SENT \$148,000

PROSPECTING	QUALIFIED	NEEDS IDENTIFIED	FOLLOW UP	PRESENTATION	CONTRACT SENT
<b>Felix Lighting - Merch Order</b> Brian Chausling \$10,000	<b>Interested in 8 Orders of All Types</b> Terra Hendrich \$16,000	<b>Product A (243 1287)</b> Jesse Price \$62,000	<b>Job Funds - Phase 3</b> Terra Hendrich \$160,000	<b>Reseller Possibility - RockHole</b> Patrick Steele \$10,000	<b>Adventure Amigo - Phase 1</b> Stephen Hoffmann \$6,000
<b>Mike's Data SPI Purchase Order</b> Jesse Price \$94,000	<b>Blue Company - Quarterly Network</b> Stephen Hoffmann \$60,000	<b>Interested in Pipeline Management</b> Patrick Steele \$45,000		<b>Easy Sell - 20 Users</b> Jesse Price \$94,000	<b>Sell 1,000 Units</b> Jesse Price \$120,000
<b>Jenaple - Wants To Add 10 Seats</b> Terra Hendrich \$77,000		<b>Interested in Pipeline Reporting</b> Brian Chausling \$140,000			<b>Blue Universe - 60 Black Frames</b> Stephen Hoffmann \$34,000
<b>CRM x 10 Licenses</b> Terra Hendrich \$0,000					
<b>Sales Training for Field Reps</b> Stephen Hoffmann \$26,000					
<b>Remove Contract - Low Method Design</b> Patrick Steele \$11,000					