

Proposal

To,
Kind attn: Mudassar Akram
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India
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Reference No	PP3569
Date	Oct 11, 2024
Valid Till	Oct 16, 2024
Executive	Ms. Pooja L
Phone	8797792995
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Reg : Business Proposal for Cloud Lead Management Solution from Solid Performers Pvt. Ltd.

Dear Mr. Mudassar Akram,

Greetings to you!

It was a pleasure having a discussion regarding your lead management requirements today and we are really happy to share with you the business proposal to be a part of your Business Growth and Effective Management.

As discussed, we are happy to share the Business Proposal here for your kind reference and guidance to proceed ahead.

Solid Performers Lead Management Software is one of the **best lead management software** with **World-class IT Infrastructure**. Our Lead Management Software has been recognized as one of the **Great User Experience Software** by various sources in the past. We are an **ISO 27001: 2013 Certified Company** for Data Security and Maintenance. Our State of Art Cloud Infrastructure is backed by **Amazon Web Server** which helps us to provide you with **service availability, sustainability, and reliability 24/7**. We strive to Commit to **“Delivering Excellence”** at all points in time.

Some of the reasons why Solid Performers is preferred over any other cloud-based Lead Management Software Solution:

- 99.9% uptime, 365 days, 24 hours a day offering real-time access & visibility.
- Complete Data Security and Reliability with ISO Certification
- Hosted on World Class Cloud Infrastructure (AWS) which minimizes downtime and increases productivity.
- Significantly lower operational or servicing costs.
- Faster implementation time.
- Always the latest version with zero risks of managing legacy software systems.
- Pro-active & highly experienced team which will help you in using the Lead Management Software effectively.
- Little or no training is required to use the system as it is very easy to use.
- Affordable customization to match your specific requirements.
- It is one of the most advanced and fastest-growing software based on the latest technology.

Solid Performers Sales Lead Management Software is leveraged by industries across the country for their day-to-day business operations.

We are enclosing the business proposal/quotation along with standard terms & conditions.

We assure you that **Solid Performers Lead Management Software** is the right solution for efficient and cost-effective management of your Organization while giving it the technology edge in the fast-evolving industry trends. We look forward to becoming partners in the progress of your Organization.

Awaiting a positive reply to proceed further.

#	Item ID	ID	Name	Rate	Unit	HSN Code	Disc. Price	Subtotal
1	SP08	48033	Hexagon CRM Pack – Yearly Additional one user free.	200	5 user(s)	997331	0%	1,000
2	SP10	48035	One Time Setup, & Implementation Charges along with Training	249	1 Nos	997331	100%	0
						Price	Offer Price	
Subtotal						1,249	1,000	
Total						USD 1,249	USD 1,000.00	

Amount in Words: **One Thousand only**

Taxes

18% GST will be applicable on the above-mentioned price.

Project Time-Lines

This will start from the date of the First Payment and as per the T&C of this document.

- Implementation Effort: 5–10 working days based on the customization required.
- Training and Handholding: 2 Days

Payment Terms

- 100% Upfront

License Cost

- 100% Advance on an Annual basis (Usage calculation will start from the date of Invoice or First Payment whichever is earlier)

Training Sessions and related terms

- Training will be provided Online only.
- We will provide you with the recorded version of the training as well.
- If any team member requires training in the future, then they can refer to this existing training video.
- One complete training session is included in the package. If you need any additional training after 15 days of software implementation, it will incur an additional USD \$50 or equivalent in your currency.

Background

Solid Performers Lead Management Software is a solution developed by Solid Performers Private Limited, India, which is accessible to Business Users covering multiple geographical locations around the Globe.

The **Solid Performers Lead Management Software** can be used as a centralized gateway to various information repositories and productivity applications.

Solid Performers Lead Management Software is one of the fastest-growing **Pre & Post Sales Management Lead Management Software**. We are an **ISO 27001: 2013 Certified** Company for Data Security and Maintenance.

Our State of Art Cloud Infrastructure is backed by **Amazon Web Server (AWS)** which provides you the service availability, sustainability, data security, and reliability 24/7. We strive to commit to “Delivering Excellence” at all points in time.

General Features

- The system will be a single sign-on i.e. all users will log in from the same page.
- The system will be business role and hierarchy based so that the users at various levels see data according to their business role & designation. You can perform complete user access restrictions in an effective way.
- This system is on **SAAS** (Software as a Service) model, so the client doesn't need to maintain any hardware and software infrastructure by themselves. Hence **reduces the TCO** (Total Cost of Ownership)
- It is **device independent** and can be used on any device, any place with the help of the internet and a browser.
- Can **import bulk leads** from other sources to our Lead Management Software in one click
- Can **bulk allocate** leads to sales executives in one simple click
- It is a **Self-Service Lead Management Software** system, with all admin controls at your end.
- Can have customized **status with color-coding** based on your requirement.
- Option to export bulk filtered leads into excel for offline access.
- Solid Performers Lead Management Software is built in such a way that you can be able to **restrict the access of any module** to any user or user role in less than a minute.

Sales, Marketing & Customer Relationship Management (Lead Management Software)

- You will have a **Lead Management Software Dashboard**, for a complete birds-eye view of all activities happening on the business front.
- You can capture all necessary information about a prospect or leads generated after the campaign and also can run e-mail campaigns directly from the Lead Management Software.
- Campaigns can/ be done as e-mail / newsletter campaigns through MailChimp & SendGrid platforms integration with the Lead Management Software.
- You can see the complete analytics of e-mails sent, reached, opened, clicked, forwarded, forwarded open, unsubscribed, etc.
- We will get leads into the system either by manual entry or bulk excel upload or web-form integration with any 3rd party websites and systems.
- There is a clear lead pipeline to understand all leads at various stages in the Lead Management Software.
- **Assign business leads** to any of your team members to nurture it further.
- All communications done by the team will be tracked and monitored as per the authentication rights of the employee of various roles and levels.
- Option to add estimate value, probability of conversion & expected closure date will help in easy forecasting.
- Once you get any specs from the generated lead, you can convert it into a requirement where you can **add multiple documents** against the lead & requirement.
- You can **track communications** between two parties by the complete communication thread.
- If any person leaves the organization, then also the history with the client remains in the Lead Management Software.
- **Make & Send commercial quotes** and proposals directly from the system and keep track and repository of all documents.
- You can send the proposal/quotation to the customer by e-mail as a **pdf attachment**, directly from the Lead Management Software.
- Once you get an order, the Lead is converted into a client/customer, with all details related to billing.
- Both **Proforma Invoice & Invoice** can be generated using the Lead Management Software.
- Track your business funnel, branch-wise, product-wise, sales team-wise, location-wise, etc. in the detailed report section.
- The **Web-form of your official website can be integrated** with the system so that leads of interested parties can flow directly into your Lead Management Software System. You can assign these leads to any of your sales team members.
- The system will give you an immediate comparison between the current business performance and last week/month/quarter/financial year, etc. for better decisions.
- A lot of filters and report options are available for strategic reports to be downloaded in excel and we also provide you with customized reports based on your business requirement.
- On-Time Mail Notifications, **alerts, and Flags** will make you escape none of your tasks and business follow-ups, giving you full control of the business.
- No need to call anyone for any update, just drill down the system 24 x7.
- You can **manage the Income & Expenses** of the company with different bank accounts.
- You can also manage **basic stock & inventory** in the Lead Management Software.
- Manage employees daily activities and their day-to-day **expenses & reimbursements** in the Lead Management Software for a clear & centralized record.

- Build relationships with customers through regular communication, ensuring better brand equity.
- The Solid Performers Sales Lead Management Software will integrate with any other 3rd party application easily. (*This will be an added cost*)
- **You can also manage multiple projects** in a single panel. Can assign a single project to multiple members in a team.
- Can add multiple tasks under a project and allocate them to the team members

Our Unique Propositions

- Custom Fields for Leads, Clients & Products
- 5 different headers for commercial proposal, proforma invoice, and invoice making
- In-Built Advance Reports
- Exportable & filterable reports
- Time Zone and Currency Capability
- Data Handling Capability: **Unlimited**
- **Cloud Space Scalability: Unlimited**
- **Mobility: 100% on any browser, any device, any location.**
- **No. of Users Scalability: Unlimited**
- **Data Security: 100%**
- **Data Encryption: 256-bit Encryption**

Exclusions

- Data Porting – Data porting from your legacy system to Solid Performers Lead Management Software is chargeable, depending upon the size & data complexity.
- Mac Address-based restriction
- Solid Performers Lead Management Software's team is not responsible for the internet speed and performance
- Anything which is not specified in the above specification and demo system is excluded.
- Integration with any 3rd party software system and APIs
- SMS Gateway integration.
- Extra Reports will be customized on-demand and will be at extra cost.
- SMS Pack cost.

Hosting, Support, and Maintenance

- Lead Management Software will be hosted on one of the best cloud infrastructures & will be maintained by Solid Performers Lead Management Software's Team.
- 99.9% Uptime Guaranteed.
- Speed and Memory are optimized by Solid Performers Lead Management Software's Team continuously.
- Solid Performers Lead Management Software's support team will provide online and phone support to all users.
- The support team will be present on Mon-Sat from 9.30 AM to 6.30 PM, India Standard Time (IST). Critical issues will be resolved 24/7 within a maximum time span of 30 minutes
- Complete Software maintenance and timely backup and 100% security are the responsibility of Solid Performers Lead

Management Software's team.

Solid Performers Private Limited shall use the following terms and conditions as the basis of the business commitment:

- 1. Initialization:** The Lead Management Software Software implementation would start within a day of the receipt of the Work Order letter / Purchase Order and/or a signed copy of this document and advance cheque/DD/online transfer from the client along with all pre-requisite information to the technical team of Solid Performers Private Limited, to facilitate in the initiation process.
- 2. Content Sourcing:** The client would provide full support to access and source the content for the Lead Management Software software. Any delay at either end should be acknowledged by email or some other recorded means and should be discussed immediately with stakeholders.
- 3. Communication:** Preferred means of communication will be Phone, Skype & Email between Solid Performers Private Limited's team and client. However, recorded means (such as Email, electronic documents delivered by hand in a Floppy/CD, a hard copy of documents delivered by courier or registered postal services) may also be used to convey any modifications/changes, which may affect the scope & cost of work.
- 4. Change Management:** Both sides agree on the above-mentioned features written thereof and also shown in the demo system. Any changes in the module or features afterward would not be considered within the scope of the project and will be taken as separate assignments. Changes in the textual/pictorial content or words within the agreed scope of work are not restricted under this clause.
- 5. Payments:** All payments to be made by Cheque/Demand Draft/Online Transfer in favor of "**Solid Performers Private Limited**" should follow the pattern (or phases) mentioned in this document. GST is extra & will be charged accordingly while billed in India only.
- 6. Usage charge:** Annual usage charge will be generated in your company's name. Payment must be made in advance.
- 7. Reminders:** Solid Performers Private Limited team will give multiple reminders for the payment if needed, which must be acknowledged by the other party. The online Lead Management Software System will automatically be on hold if no payment is received within 5 days of the invoice date.
- 8. Confidentiality:** Solid Performers Private Limited & the Client would work in total confidentiality regarding the project identity, content, methodology & material, and all related information.
- 9. Support & Response Time:** Solid Performers Private Limited commits to providing immediate response to update related support calls during the maintenance phase. However, application-related problems may take more time depending upon the nature of the problem and reporting time. Solid Performers Private Limited will provide support from Monday to Friday from 10 AM to 6 PM via email/phone/Skype/Google Meet.
- 10. Agreement Renewal:** This document will also be considered a formal agreement between the seller and the customer, and the same will be renewed after 12 months from the date of the Purchase Order/Work Order.
- 11. IPR (Intellectual Property Right):** Software code is and will be the IPR (Intellectual Property Right) of Solid Performers Private Limited and will not be transferred.
- 12. Exit Clause:** In an event of exit/closure/stop from the usage of the cloud-based software, the customer must inform the

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service provider by a written e-mail or letter on their official letterhead, with 30 day's notice period. All pending invoices and payments must be cleared if any. All business data can be easily exported and downloaded by the customer at any point in time.

13. **Data Availability Post-Exit:** All data will be available to the customer for 30 days from the date of formal exit to facilitate the customer in their smooth transition. Though we don't want to lose any customers, we'll handhold them during their transition. After 30 days Solid Performers Private Limited will delete their data and files permanently. It will not be shared and or sold to any 3rd party at all.
14. **Licenses Refund:** Once a user license is purchased, it can't be refunded back.
15. **Licenses Transfer:** Any abandoned or unused license can be re-assigned to a fresh/new user with the help of our support team.
16. **Data Security and Compliance:** We follow GDPR and PCI compliance. The data is fully safe & secured having a multi-layer security mechanism.
17. Solid Performers represents and **warrants** to the Second Party that:
18. The product is the original work of Solid Performers Private Limited in each and all aspects
19. The software product and its use do not infringe, to the best of Solid Performers Private Limited's knowledge, any copyright or trade secret rights of any third-party organization across the world.
20. Solid Performers Private Limited will continuously provide fixes for any bugs, and upgrades to the software product during the agreement period.