

Empanellment of Vendor for CRM

Acuite Ratings & Research Limited is currently seeking a reliable CRM solution to enhance the efficiency and productivity of our Sales team. The CRM will be used by employees across three of our group companies, approximately 100 users.

The key activities we expect the CRM system to support include:

- **Lead Management:** Effective tracking and management of leads.
- **Meeting Tracker:** Organizing and logging meetings for the Sales team.
- **Business Closure Tracking:** Monitoring the successful closure of deals.
- **MIS Generation:** Creation of daily, weekly, and monthly reports to track performance and activities.
- **Calendar Views:** Both future and past calendar views for Senior Management for better planning and insights.
- **Internal Policies & Business Rules:** Easy access to internal policies, various business rules, and system validations.
- **Quality Control (QC):** The solution must have in-built quality control to ensure smooth operations and data integrity.
- **Attendance :** To capture attendance of the work force along with leave approvals
- **Reimbursement :** easy approval process for claiming the expenses incurred for the meeting

We kindly request you to submit your quotation, including a detailed breakdown of features, pricing, and implementation timelines, by **7th April 2025**.

Looking forward to your response and exploring the possibility of working together.