

ENVOY - Complete CRM tool for brokers to manage supplier relationships

- ❖ Envoy is a CRM tool for brokers which provides a central place to store and share customer data, prospect data, track customer interactions, and share this information across their company. It allows brokers to manage leads, sales and relationships with customers, helping them to grow.
- ❖ Multiple Supplier data can be easily integrated into the system including broker and sub-broker commissions.
- ❖ It is integrated with ECOES & XOSERVE; thus, meter details are updated automatically from the industry, in one click.



- ❖ Automatically get all EAC details and HH data for HH meters with just a click of a button as fully integrated with the industry.
- ❖ Get ESOS and FEDRA carbon reports in the system and create customized reports from the available data.
- ❖ Automatically calculates commissions based on the setup - in percentage or fixed pence amount per KWh.
- ❖ Allows brokers to offer customer portal to their customers for managing and updating their details.

ENVOY - Features

- ❖ Integrated with Ombudsman system with dashboard access for managing complaints automatically.
- ❖ Has a unique CRM feature which represents the Contract's life cycle and status in a graphical format.
- ❖ System provides in-built e-sign functionality for contracts.
- ❖ Price quotations can be updated automatically with easy integration of the Supplier's pricing API or by uploading them from flat files via emails.



- ❖ 5-year visual representation of commodity & non-commodity market prices.
- ❖ Can be integrated with any phone system to automatically attach verbal contracts and call recordings.
- ❖ Allows setting up customer Groups with hierarchies.
- ❖ Supports having Groups and Sub-groups with different sites belonging to different suppliers.
- ❖ Create LOAs with letterheads for customers.
- ❖ Manage MOP contracts via the same tool.

ENVOY - Benefits

1. Avail bill validation as a managed service
2. E-sign functionality saves extra cost of buying DocuSign or Adobe, etc.
3. In-built submission module enables automatic submission of signed contracts to the supplier
4. Easily manage and track objections for the new sale using the Objection Module
5. Complete auditability and visibility of actions via the activity log
6. Provide better customer service through the ticketing system to log customer issues and track them to completion
7. Get a bird's eye view of prices across 5 years, on a single screen
8. Stay informed by conducting credit checks on customers
9. Easily track status of each contract in a graphical format
10. Build your own reports as needed with a built-in report module



**Manage
Customer Data**



**Pull Customized
Reports**



**Create Groups
& Sub-groups**



**Verbal contracts
& recordings**



E-sign



Automation



**Calculate
Commissions**



**Better Customer
Service & Ticketing**



**Graphical
Representation**



**Create LOAs &
Manage Contracts**