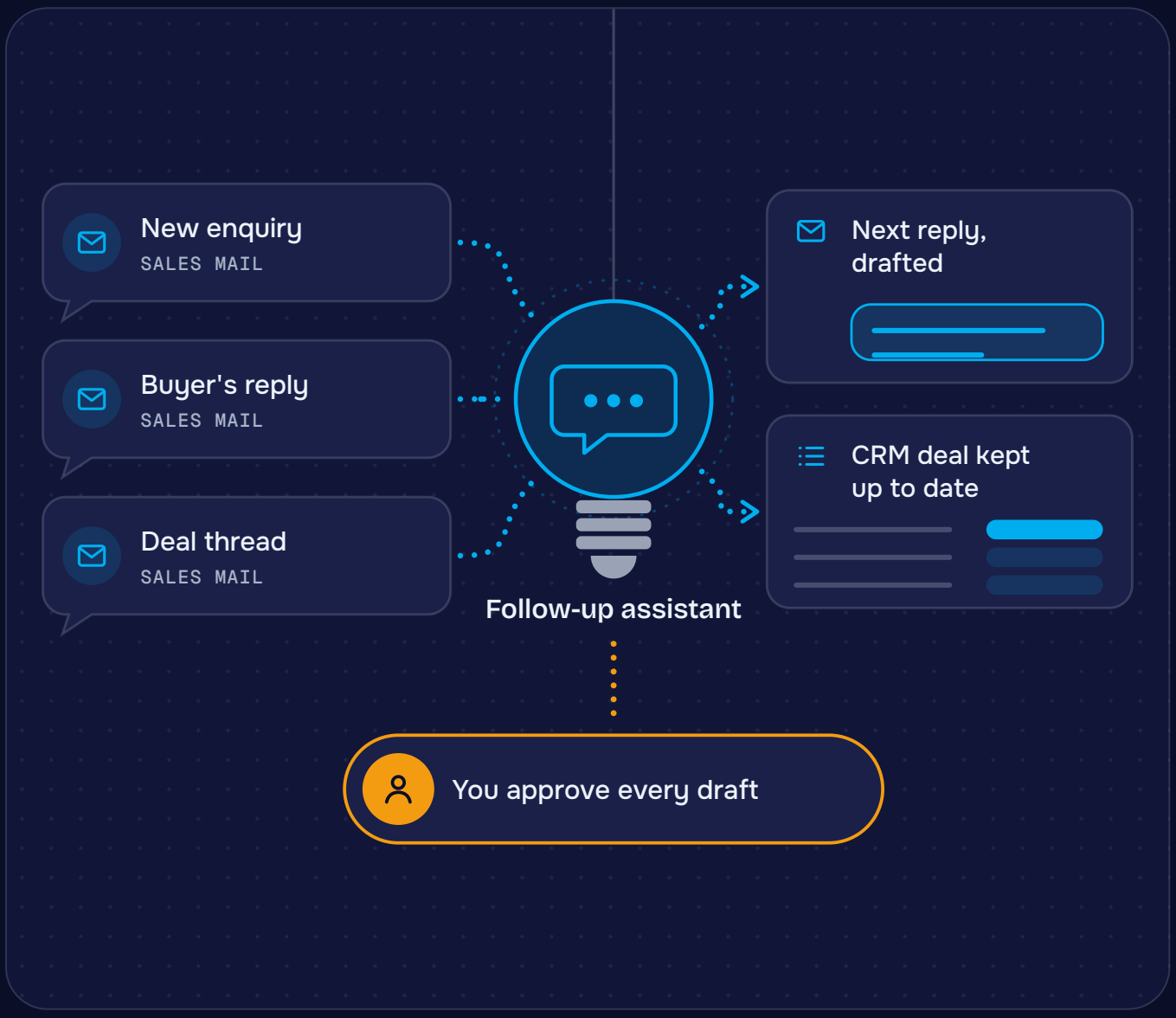
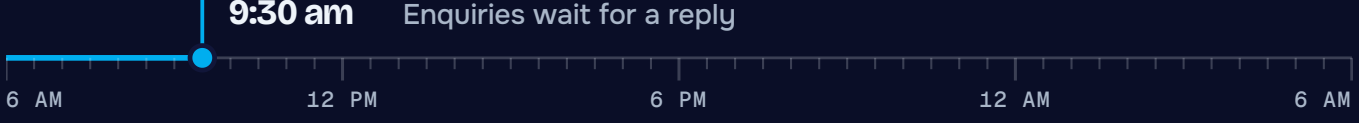
Web Vijayi

SERVICE BROCHURE

Sales follow-up assistant

For sales teams: replies drafted for your yes, quiet deals flagged, CRM updated.





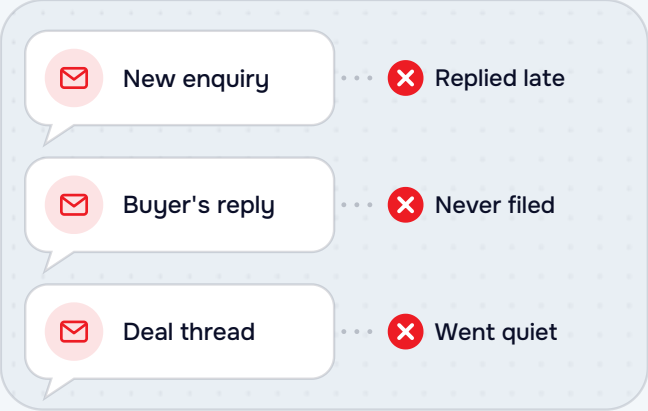
Who it is for

Sales teams in medium and large companies that sell to other businesses, already use a CRM and have more enquiries and open deals than they can follow up in time.

- B2B SALES TEAMS
- TEAMS WITH A CRM
- CRM SUCH AS HUBSPOT

Follow-up slips and deals go quiet

- Enquiries and open deals arrive faster than anyone can follow up, so replies go out late.
- Updating the CRM takes typing nobody has time for, so the record falls behind.
- Quiet deals sit untouched, and the record no longer shows where each one stands.



BEFORE: LATE REPLIES AND A CRM BEHIND

What we set up

A follow-up assistant that works inside the CRM you already use, such as HubSpot or Salesforce. It reads only the sales mailboxes you connect, files each conversation against the right deal and drafts the next reply. Your salesperson reads it, changes it if needed, and sends it.

Keeps the record

Each conversation is filed against the right contact, company and deal, with the stage and next step updated.

Drafts the next reply

Written in your team's tone from your approved material, for a salesperson to read, change and send.

Lists the quiet deals

Quiet deals are listed with a suggested next step for each. You decide what to do.

How it works

WE DO THIS · TOGETHER

1 · 2 · 3 · 4

TOGETHER

We map your sales stages and tone

We write down how deals are organised today, what each stage means and how your team writes.

US

We connect the mailboxes and CRM

Only the sales mailboxes you name, and the CRM you choose. Personal and internal mail is left alone.

TOGETHER

We run it beside your team

It only drafts at first. Salespeople approve each draft and record change; a person on our side checks the work during the first weeks.

TOGETHER

We review weekly and adjust

You get a short weekly summary of what was filed, drafted, sent and passed to a person, and we adjust the setup with you.

What you get

- ✓ Sales mail filed against the right contact, company and deal
- ✓ The stage and the next step kept up to date in your CRM
- ✓ The next reply drafted in your team's tone, ready for approval
- ✓ A list of quiet deals with a suggested next step for each
- ✓ Missing company details filled in, with the source marked for checking
- ✓ A weekly summary of what was filed, drafted, sent and passed to a person

What we need from you

- Access to the sales mailboxes and the CRM you choose
- Your sales stages, and examples of how your team writes
- Your approved material for replies
- A named person for unusual messages
- Time with your sales lead in the first weeks

Timeline We agree the timeline with you before we start.

You stay in control

Check it, pause it or stop it at any time.

You approve each draft

A salesperson reads, changes and sends each reply. Named routine messages go by themselves only if you choose.

Unusual mail goes to a person

Complaints, price or contract questions, legal points and angry messages go straight to a named person.

It records what it did

You can check every draft and record change. If routine messages go by themselves, it tells you each time.

Pause it or switch it off

After the first weeks, you choose which record changes it may make alone. Each is recorded. Switch back any time.

Questions people ask

What mail does the assistant read?

Only the sales mailboxes you connect, and only sales conversations in them. Personal and internal mail is left alone.

Does it send mail to customers on its own?

No, unless you choose otherwise for named routine messages. It drafts the next reply and a salesperson reads it, changes it if needed, and sends it.

Does it send cold mail or buy lists?

No. It never uses bought lists, never sends cold bulk mail and never contacts anyone who has not written to you or agreed to hear from you.

Do our records stay in our CRM?

Yes. Each conversation is filed in the CRM you already use, such as HubSpot or Salesforce, and your records stay yours.

Tell us where your follow-up slips

Late replies, quiet deals or a CRM behind? We'll map where an assistant would help first. If you can, bring a recent week of enquiries and open deals.

We quote every setup in writing after a free consultation, with the timeline agreed in the same quote.

webvijayi.com

care@webvijayi.com

Book a free consultation:
webvijayi.com/contact