



# LASSO CRM

# EXTENDED PROFILE



## OVERVIEW

Lasso CRM is specifically designed to support the needs of real estate developers and home builders. It is a cloud-based platform, available on desktop, mobile or tablet, making it suitable for salespeople who need to travel to see customers.

The software is designed to manage and organize the list of prospects who may be interested in purchasing a property. The aim of Lasso CRM is to reduce data entry, distribute possible buyers to the right salespeople and integrate your sales team for better lead follow up.

Lasso CRM has the capacity to create segment your prospects into lists that allow you to understand a target segment of your market immediately. It also offers reminders of future activities, a full history of a prospect and the opportunity to easily add information to records so that all relevant employees can access it.

Lasso CRM offers an integrated approach to sales. This process works from initial interest from the customer, to trying to engage with them, nurture the sales relationship through to building a sales' relationship with plans, options, and appointment setting. Lasso CRM is customizable and integrates with Outlook, Google and video email.

Lasso CRM also offer a live demo, plus email and telephone support for customers. There are also webinars, videos, and guides on their website to help the user get the most out of their software and fix common issues themselves.

## FEATURE OVERVIEW



## SOFTWARE SPECIFICATION

<b>OVERVIEW</b>	
PRODUCT NAME	Lasso CRM
<b>SOFTWARE FEATURES</b>	
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>SUPPLEMENTARY FEATURES</b>	
CPQ	✗
CUSTOMER SERVICE AUTOMATION	✗
MARKETING AUTOMATION	✗
SOCIAL RELATIONSHIP 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**

\$495 / month

**IMPLEMENTATION TIMEFRAME**

30 Days



## SOFTWARE SCREENSHOTS

**LASSO** | Marketing | Outside Realtors | Registrant | Reports | Kathy Barnes (Preferences) | Logout

Best Builder Homes | Search | Edit Registration | Add Relationship | Add Note | Add Reservation | Add Activity | Make Appointment | Add History | Assign Purchaser/Inventory | Assign Outside Realtor | Add Lawyer | Email | Print

**Registrant: John Brown**

Save Layout

### Contact Information

Personal ID: 14234219  
 Name: John Brown  
 Date of Birth:   
 SSN/SIN:   
 Contact Preference: Any  
 Email - Show all  
 Type: Email  
 Primary: abcreative@hotmail.com  
 Phone Number - Show all  
 Type: Phone  
 Home: 512-555-6768  
 Company:   
 Job Title:   
 Sender:   
 Registration Date: June 26, 2013 12:00AM  
 Last Modified: July 12, 2013 4:31PM  
 Created On: June 26, 2013 3:43PM  
 Entered By: N/A

### Questions

Best Builder Homes -  
 How did you hear about Best Builder Homes?: Referral  
 When are you interested in purchasing?: In 6 - 12 months  
 What is your desired price range?: \$300,000 - \$395,000  
 What is your reason for purchase?: Primary Residence  
 What is the number of bedrooms you desire?: 3  
 What is your preferred home size?: 2400+ sq ft  
 Which project are you interested in?: Westlake Vista

### Notes

Best Builder Homes -  
 Note #1: Send  
 Jul 9, 2013 10:22 AM

### Sales Details

Rating: C  
 Rating History: C July 9, 2013 10:38AM  
 N June 26, 2013 3:43PM  
 Follow-up Process: N/A  
 Source Type: Online Registration  
 Secondary Source Type: Website  
 Sales Reps: Assigned: Barnes, Kathy (Primary Sales Rep)  
 Unassigned: Boone, Judy; Bax, Chris; Firth, Connie; Mahoney, Tony; O'Neil, James; Oweit, Corb; Smythe, Jane; Wilk, Bill  
 Current Projects: 1. Best Builder Homes  
 Status: Normal  
 Contact Preference: Any  
 Exclude from Traffic Reports:   
 My Groups: Assigned; Unassigned

### Self Serve Registrant Updates

Manage Logins

### Activities

Type	Date	Details	Notes
Email	June 26, 2013	2-Follow-up	
Phone Call	June 26, 2013	N/A	Follow-up from email
Phone Call	July 15, 2013	N/A	Confirm appointment

### Campaigns

Manage  
 No campaigns assigned

