skoopflow

Get the skoop!

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Streamline channel sales operations

1.↗

Build your product catalog

2.↗

Establish your channel network

3.↗

Define channel objectives

4.↗

Boost sales by marketing products

5.↗

Manage leads, orders & shipments

6.↗

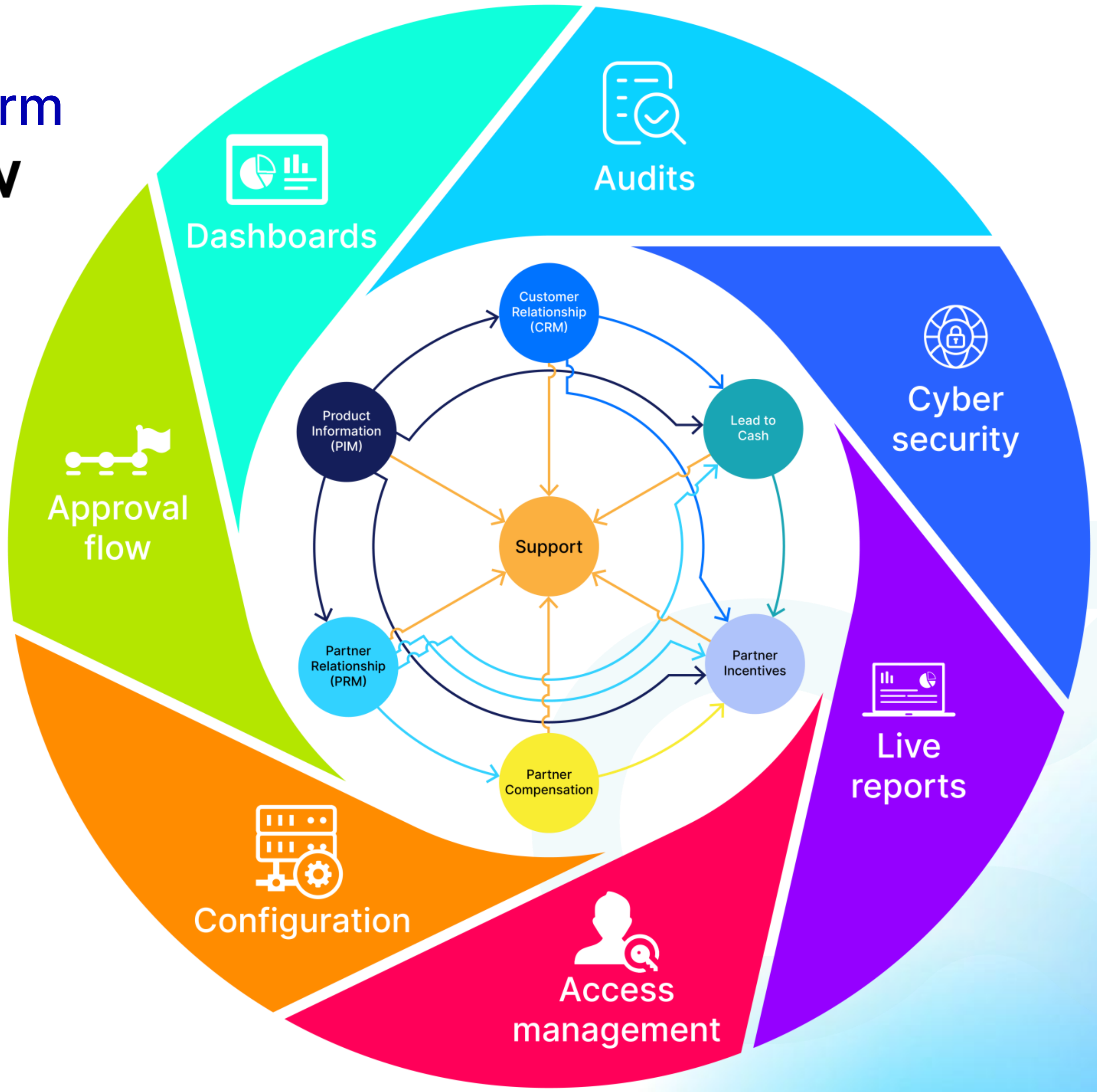
Evaluate Channel Member Performance

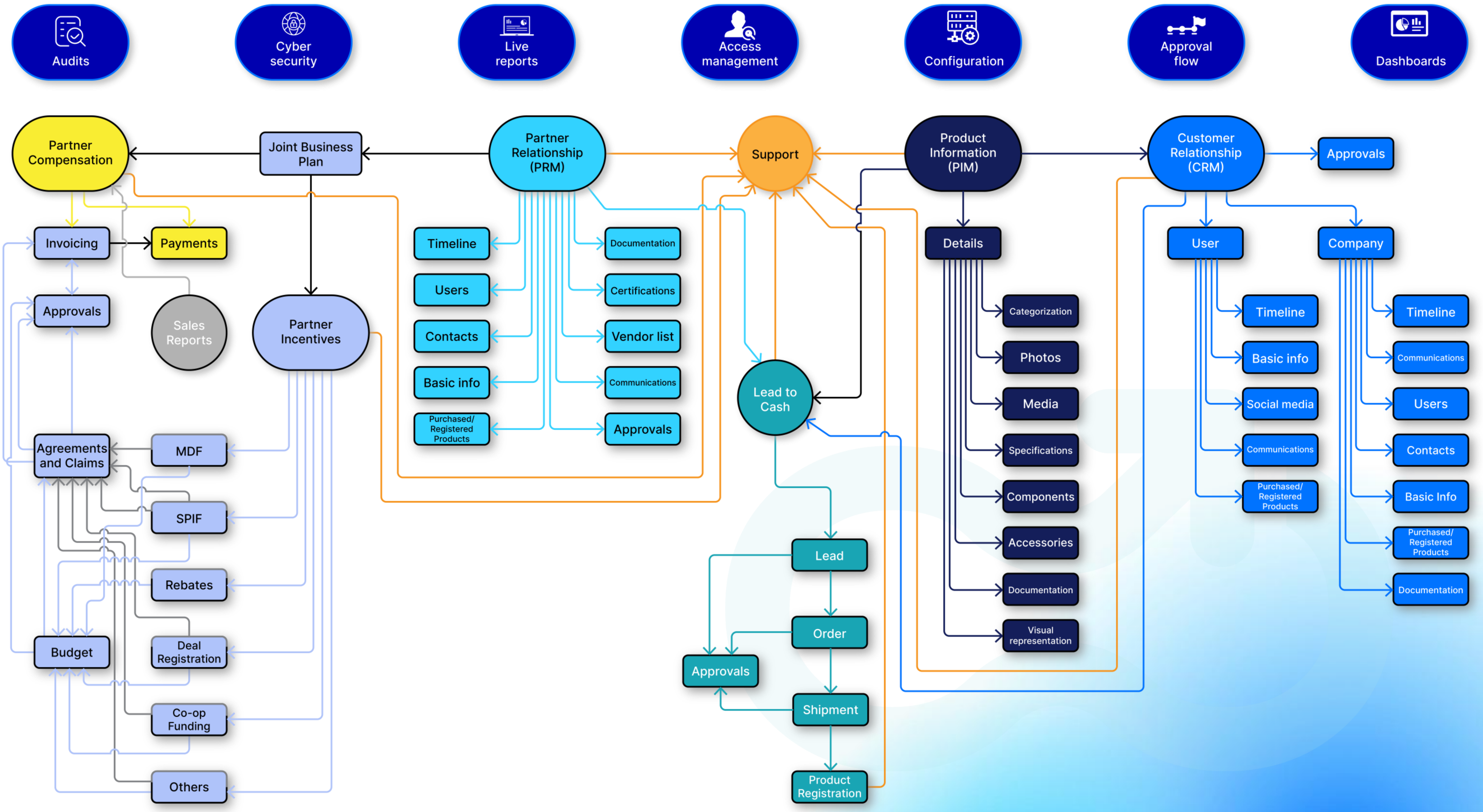
7.

Support products & end customers

Unified platform

skoopflow





Audits
Cyber security
Live reports
Access management
Configuration
Approval flow
Dashboards
Partner Compensation
Joint Business Plan
Partner Relationship (PRM)
Support
Product Information (PIM)
Customer Relationship (CRM)
Approvals
Invoicing
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Approvals
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Agreements and Claims
MDF
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Deal Registration
Co-op Funding
Others
Timeline
Users
Contacts
Basic info
Purchased/ Registered Products
Documentation
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Lead to Cash
Lead
Order
Approvals
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Visual representation
User
Timeline
Basic info
Social media
Communications
Purchased/ Registered Products
Company
Timeline
Communications
Users
Contacts
Basic Info
Purchased/ Registered Products
Documentation

Platform Basics

Power by bmc helix

SECURE
CONNECTED
INTELLIGENT

- Enterprise-Grade Cybersecurity and Compliance
  - Ensure enterprise-level security with built-in encryption, role-based access control, multi-factor authentication and single sign-on.
  - Comply with global security standards and data protection.
  - Provide automated threat detection and vulnerability assessments.
  - Maintain audit logs to track activity and prevent unauthorized access.
- Unmatched Integration Capabilities
  - Seamlessly connect with any third-party applications.
  - Support API integrations for quick deployments.
  - Enable bi-directional data flow across modules for a unified ecosystem.
  - Extend functionality with integrations to enterprise applications.
- Business Intelligence and Analytics
  - Offers real-time dashboards, predictive analytics, and AI-powered insights for data-driven decision-making.
  - Track performance across entire ecosystem.
  - Provide customizable reports with drill-down capabilities.
  - Use machine learning to detect trends, anomalies and opportunities.

SECURE
CONNECTED
INTELLIGENT

- Comprehensive Audit Trails and Governance
  - Automatically records all user actions, system changes, and approvals.
  - Enables forensic-level auditing to support compliance and governance.
  - Provides historical data tracking to analyse transactions and changes.
  - Ensures accountability with granular visibility into modifications.
- Robust Access Level Controls
  - Implements role-based, attribute-based, and dynamic access controls for precise security.
  - Supports hierarchical permissions, ensuring the right level of access.
  - Provides single sign-on (SSO) for secure user authentication.
  - Enhances data security with customizable policies for different roles.
- Ultra-Flexible Approval Workflows
  - Automates complex approval processes.
  - Customizes approvals based on roles, thresholds and business rules.
  - Enables mobile and remote approvals for seamless decision-making.
  - Integrates approval workflows across sales, marketing, finance, procurement and IT operations.

PIM

Product Information Management

STREAMLINE PRODUCT INFORMATION

- Provide Product Data for Individual Sellers and Large Organizations
  - Manage product catalogues for both small businesses and enterprise-level retailers.
  - Support multi-brand and multi-region strategies.
  - Customize product feeds.
  - Unify product information from multiple sources.
- Centralized Product Data Management
  - Store and organize all product-related information.
  - Ensure data consistency across multiple sales and marketing channels.
  - Support multi-language and localization features for global markets.
  - Standardize product attributes and categorization for easy retrieval.
- Data Enrichment and Customization
  - Enhance product listings with detailed descriptions, rich media.
  - Enable product variations and bundling.
  - Support advanced tagging for better searchability and filtering.
  - Allow for custom product feeds based on channel-specific requirements.

STREAMLINE PRODUCT INFORMATION

- Multi-Channel Distribution and Syndication
  - Sync product data across platforms, marketplaces and catalogues.
  - Automate updates to ensure real-time accuracy across all channels.
  - Adapt data formats for different channels.
  - Support API integrations with ERP and other business systems.
- Workflow Management and Collaboration
  - Facilitate access for marketing, sales, product teams and partners.
  - Automate workflows for product data approval, updates, and publishing.
  - Track version history and audit trails for compliance and data integrity.
  - Allow external feedback and updates through self-service portals.
- Data Enrichment and Customization
  - Provide insights into product performance across different sales channels.
  - Identify missing or incomplete data that may impact sales.
  - Track customer engagement with product content.
  - Use AI and automation to recommend content improvements.

PRM

Partner Relationship Management

CONTROL PARTNER ECOSYSTEM

- Regulate Performance of All Partners
    - Manage small and large retailers, resellers and distributors.
    - Support multi-tier partner structures.
    - Customize commission models.
    - Consolidate deal data.
- Partner Onboarding and Training
    - Optimize and automate partner registration, approval workflows and contract management.
    - Provide documentation, training materials, certifications and partner enablement programs.
    - Track partner progress on training and certification completion.
    - Ensure partners access to the latest product updates and sales tools.
- Deal Registration and Sales Management
    - Allow partners to register deals to prevent channel conflict.
    - Track partner-driven sales performance and incentives.
    - Provide visibility into pipeline, quotas, and commission structures.
    - Ensure partners follow proper sales processes and guidelines.

CONTROL PARTNER ECOSYSTEM

- Co-Marketing and Lead Sharing
    - Enable MDF, SPIF, Rebates, etc. for joint marketing campaigns.
    - Share marketing assets, campaign templates, and brand guidelines.
    - Distribute and track leads generated through and for partners.
    - Provide performance analytics on marketing efforts and ROI.
- Partner Support and Collaboration
    - Include a partner portal for deal tracking, support requests, and resources.
    - Offer dedicated support channels for escalations and issue resolution.
    - Facilitate communication through chat, forums, and knowledge bases.
    - Help partners access technical support and training when needed.
- Data and Analytics
    - Provide real-time dashboards on partner performance, sales trends and engagement.
    - Track which partners are most effective in closing deals.
    - Measure ROI on partner-driven sales and marketing efforts.
    - Use AI to suggest growth opportunities.

CRM

Partner Relationship Management

MANAGE CUSTOMER RELATIONSHIPS

- Track Sales for both Individuals and Large Organizations
  - Manage B2B and B2B accounts.
  - Support for multi-level account structures.
  - Flexible and customizable sales processes.
  - Consolidate customer data from multiple touchpoints.
- Sales Management
  - Track leads, opportunities, and deals through the sales pipeline.
  - Automate follow-ups, reminders, and email outreach.
  - Assign leads to sales reps based on geography, industry, or priority.
  - Forecast revenue based on sales trends and past performance.
- Customer Interaction Tracking
  - Log all communications (emails, calls, meetings, chat).
  - Create a 360-degree view of customer history and engagement.
  - Enable real-time collaboration between sales, marketing, and support teams.
  - Use AI to suggest next-best actions based on past interactions.

MANAGE CUSTOMER RELATIONSHIPS

- Marketing Automation
  - Automate email campaigns, lead nurturing, and segmentation.
  - Track how customers engage with marketing content.
  - Score leads based on engagement to prioritize follow-ups.
  - Personalize outreach based on customer behaviour and preferences.
- Customer Support and Case Management
  - Manage support tickets, customer inquiries, and service requests.
  - Integrated knowledge base and self-service portal.
  - Track response times and customer satisfaction (CSAT, NPS).
  - Auto-route cases to the right support agents.
- Data and Analytics
  - Provide real-time dashboards on sales, marketing, and support performance.
  - Measure customer lifetime value (CLV), retention trends, and churn.
  - Use AI-driven insights for sales forecasting and deal predictions.
  - Identify bottlenecks in the sales or customer service process.

JBP

Joint Business Plan

BUILD STRONGER PARTNERSHIPS

- Create a Joint Business Plan With All Partners
  - Customize joint business plans.
  - Support multi-tier partner structures.
  - Align corporate objectives.
  - Consolidate data from multiple sources.
- Strategic Goal Alignment
  - Establish shared objectives between a company and its partners.
  - Define KPIs for mutual growth and success.
  - Align sales forecasts, marketing plans, and investment priorities.
  - Ensure both parties are committed to long-term collaboration and value creation.
- Sales and Revenue Growth Planning
  - Identify growth opportunities through various strategies.
  - Develop demand-generation plan to increase market share and revenue.
  - Set pricing strategies, volume targets, and promotional activities.
  - Use data-driven forecasting to optimize sales and supply chain planning.

BUILD STRONGER PARTNERSHIPS

- Co-Marketing and Investment Optimization
  - Allocate MDF and other co-marketing budgets effectively.
  - Plan campaigns to drive awareness and customer engagement.
  - Track marketing ROI and adjusts strategies based on performance.
  - Ensure brand alignment and messaging consistency across all activities.
- Performance Monitoring and Continuous Improvement
  - Establish regular business reviews to assess progress and realign strategies.
  - Analyse sales performance, profitability, and partner contributions.
  - Implement corrective actions based on data insights and market trends.
  - Strengthen partnerships through transparent communication and trust.
- Data and Analytics
  - Provide real-time dashboards to track sales, marketing, and operational performance.
  - Use predictive analytics to identify new market opportunities.
  - Monitor partner engagement, compliance, and goal attainment.
  - Leverage AI-driven insights to refine strategies and maximize efficiency.

L2C

Lead Management

CAPTURE, QUALIFY, CONVERT

- Manage Leads for Small Deals and Large Enterprise Opportunities
    - Manage both B2C leads and long-cycle B2B enterprise opportunities.
    - Measure the impact of marketing efforts.
    - Customize lead routing workflows.
    - Consolidate lead data from multiple channels into a real-time dashboard.
- Lead Capture and Qualification
    - Collect leads from multiple sources.
    - Use AI and automation to qualify leads based on predefined criteria.
    - Assign lead scores based on engagement level, intent signals and fit with ideal customer profile (ICP).
    - Ensure compliance adherence for data privacy.
- Lead Nurturing and Engagement
    - Automate personalized follow-ups and targeted content delivery.
    - Use behavioural triggers to adjust engagement strategies.
    - Provide sales teams with insights into lead activity and buying intent.
    - Integrate marketing automation tools for seamless workflow execution.

CAPTURE, QUALIFY, CONVERT

- Lead Handoff and Sales Readiness
  - Define clear lead qualification criteria (MQL → SQL) for efficient handoff.
  - Use real-time notifications and dashboards when leads are sales-ready.
  - Enable collaboration between marketing and sales.
  - Automate lead routing to the right sales rep.
- Lead Conversion and Sales Performance Optimization
  - Track lead progression through the sales funnel.
  - Analyse which sales strategies lead to the highest win rates.
  - Measure the impact of marketing efforts on lead conversion.
  - Use AI-driven insights to recommend the best engagement tactics.
- Data and Analytics
  - Provide real-time dashboards to visualize pipeline health and trends.
  - Use predictive analytics to identify high-potential leads and forecast sales outcomes.
  - Monitor lead acquisition costs (CAC) and ROI per channel.
  - Integrate with other tools to ensure data consistency across ecosystem.

L2C

Order Management

ACCURATE, EFFICIENT FULFILLMENT

- Manage Orders for Small Deals and Large Enterprise Contracts
  - Handle high-volume, low-value transactions through automation.
  - Automate complex, multi-tiered contracts for deals with approvals.
  - Support split shipments, partial fulfillment, and global logistics coordination.
  - Integrates with other systems for seamless order-to-cash management.
- Order Capture and Validation
  - Collect orders from multiple channels.
  - Validate details, availability and pricing accuracy before processing.
  - Ensure compliance with terms, agreements and discount structures.
  - Use AI-driven recommendations to make checkout suggestions.
- Configuration, Pricing and Quoting (CPQ)
  - Automate the creation of accurate, customized quotes as needed.
  - Support complex product configurations, bundling, and rule-based pricing.
  - Ensure compliance with predefined discount structures and approvals.
  - Reduce manual errors and accelerate quote approval to speed up sales.

ACCURATE, EFFICIENT FULFILLMENT

- Order Processing and Fulfillment
  - Automate order approvals, invoicing, and contract finalization.
  - Route orders to the right fulfillment centers.
  - Integrate with inventory to prevent stockouts and overcommitments.
  - Provide real-time order tracking and status updates.
- Billing & Revenue Recognition
  - Generate invoices automatically.
  - Support subscription billing, recurring payments, and milestone-based invoicing.
  - Ensure compliance with revenue recognition standards.
  - Provide visibility into revenue streams, outstanding payments, and cash flow.
- Data and Analytics
  - Track order accuracy, processing times, and fulfillment efficiency.
  - Monitor pricing trends, discount effectiveness, and conversion rates.
  - Use predictive analytics to optimize inventory and avoid delays.
  - Provide sales and finance teams real-time insights into performance.

L2C

Shipment Management

SPEED, ACCURACY, CONTROL

- Handling Shipments for Small Packages and Large Freight Orders
  - Support small parcel, LTL and full freight shipments.
  - Manage cross-border shipping complexities, including duties, tariffs, and documentation.
  - Enable bulk shipment processing for high-volume B2C and B2B logistics.
  - Integrates with ERP, WMS and TMS systems.
- Shipment Planning and Logistics Coordination
  - Determine the most efficient shipping methods.
  - Integrate with carrier networks for real-time rate comparisons.
  - Support multi-warehouse fulfillment, split shipments, and drop-shipping.
  - Automate carrier selection, route optimization, and shipment scheduling.
- Shipment Execution and Tracking
  - Automate generating shipping labels, packing slips and documentation.
  - Enable real-time tracking of shipments with automated status updates.
  - Provide proactive alerts for potential delays, missed deliveries, or issues.
  - Support last-mile delivery coordination, including proof of delivery and digital signatures.

SPEED, ACCURACY, CONTROL

- Inventory and Supply Chain Visibility
    - Sync inventory levels across warehouses and fulfillment centers to prevent stockouts.
    - Track in-transit inventory to provide real-time updates.
    - Analyse demand forecasting to optimize stock replenishment.
    - Ensure regulatory compliance for international shipments.
- Returns and Reverse Logistics
    - Streamline return requests with automation and approval workflows.
    - Track return reasons and trends to improve product quality and customer satisfaction.
    - Manage refurbishment, restocking, or disposal of returned items.
    - Provide analytics on return rates, processing times, and cost recovery.
- Data and Analytics
    - Monitor delivery performance, carrier efficiency, and shipping costs.
    - Use AI insights to optimize shipping routes and minimize transit delays.
    - Provide real-time dashboards to track shipments and exceptions.
    - Analyse cost-per-shipment trends to improve rates and margins.

Sales Reporting

OPTIMIZING SALES PERFORMANCE

- Reporting for SMB Sales and Enterprise Accounts
  - Support transactional and detailed for SMB sales and enterprise deals.
  - Provide granular deal tracking for complex enterprise sales cycles.
  - Integrate with finance systems to align sales data with revenue recognition and commissions.
  - Automate summary reports for C-level visibility into sales performance.
- Sales Performance Tracking
  - Measure sales KPIs such as revenue, quota attainment, and win rates.
  - Identify top performers and areas for improvement.
  - Monitor sales cycle length and deal velocity to optimize conversion rates.
  - Provides real-time leaderboards and performance dashboards.
- Pipeline and Forecasting Analysis
  - Track deal progression through the sales funnel to identify bottlenecks.
  - Use historical data and AI to predict revenue and quota attainment.
  - Analyse pipeline health to ensure a balanced mix of various stage deals.
  - Provide forecasting to anticipate best- and worst-case outcomes.

OPTIMIZING SALES PERFORMANCE

- Customer and Product Sales Insights
    - Break down sales performance by desired segments.
    - Identify best-selling and underperforming SKUs to optimize strategies.
    - Analyse patterns to inform upsell, cross-sell, and retention efforts.
    - Track contract renewals, churn rates, and customer lifetime value (CLV).
- Sales Activity and Productivity Monitoring
    - Measure sales team activity.
    - Identify which sales behaviours correlate with higher conversion rates.
    - Monitor response and lead follow-up speed to improve engagement.
    - Analyse sales enablement effectiveness.
- Data and Analytics
    - Centralize sales data across CRM, PRM, ERP, and marketing automation platforms.
    - Use real-time dashboards and reports to visualize key sales trends.
    - Leverage AI to detect patterns and recommend data-driven actions.
    - Enable self-service reporting for sales leaders, allowing for ad-hoc analysis and deep dives.

Sales Compensation

SMARTER SALES COMPENSATION

- Compensation for SMB Sales and Enterprise Deals
  - Support high-velocity sales models with simplified commission tracking.
  - Handle complex, multi-tiered enterprise sales compensation structures.
  - Manage global compensation plans, including currency and taxes.
  - Provide self-service dashboards and real-time payout estimates.
- Compensation Structure and Incentive Planning
  - Define commission structures to align with sales goals.
  - Support different incentive models.
  - Customize compensation plans for different roles.
  - Ensure alignment between sales compensation and company growth objectives.
- Commission Calculation and Automation
  - Automate commission calculations.
  - Support complex compensation rules.
  - Integrate with CRM, ERP, and payroll systems for seamless data flow.
  - Reduce errors and disputes by ensuring transparent commission processing.

SMARTER SALES COMPENSATION

- Performance-Based Rewards and Recognition
  - Track quota attainment and bonuses in real time to motivate sales.
  - Support incentives such as leaderboards, trips and exclusive perks.
  - Provide gamification elements to drive engagement.
  - Offer dashboards for sales reps to track their earnings and progress.
- Compensation Compliance and Governance
  - Ensure adherence to legal, tax and financial compensation regulations.
  - Manage clawbacks, refunds and adjustments in line with contract terms.
  - Provide audit trails / detailed reports to finance and compliance teams.
  - Aligns with revenue recognition standards to prevent misreporting.
- Data and Analytics
  - Analyse compensation trends to identify effective incentive structures.
  - Track commission payouts vs. revenue impact to ensure cost-effectiveness.
  - Use predictive AI to assess the impact of compensation plan changes.
  - Provide finance and leadership teams with real-time visibility into compensation costs and ROI.

Product Registration

REGISTER, PROTECT, ENGAGE

- Registration for Consumer Goods and Enterprise Products
  - Support single-product and bulk registrations.
  - Offer integrations for streamlined B2B registrations.
  - Manage user access for product ownership and IT asset tracking.
  - Provide APIs for seamless integrations.
- Customer and Product Onboarding
  - Enable customers to register products through online portals, mobile apps or QR codes.
  - Capture essential customer, product and purchase information.
  - Verify warranty status and eligibility based on registration data.
  - Provide instant confirmation and access to available user docs.
- Warranty and Service Management
  - Automate warranty activation.
  - Track warranty periods, coverage levels and expiration dates.
  - Enable self-service claims and repair requests for registered products.
  - Integrate with service management platforms for seamless support and issue resolution.

REGISTER, PROTECT, ENGAGE

- Customer Engagement and Retention
  - Send personalized product tips, usage recommendations, and maintenance reminders.
  - Offer exclusive promotions, discounts, and extended warranty options.
  - Collect customer feedback and reviews to improve quality & satisfaction.
  - Strengthen brand loyalty by fostering a direct connection with customer.
- Compliance and Product Safety Tracking
  - Ensure compliance with product recall regulations with ownership info.
  - Enable fast and targeted communication in case of recalls or safety notices.
  - Support industry-specific compliance needs.
  - Provide detailed audit trails for regulatory reporting and quality control.
- Data and Analytics
  - Identify trends in product adoption, regional demand and demographics.
  - Track registration rates vs. sales volume to optimize marketing strategy.
  - Analyse warranty claims and service requests to improve products.
  - Provide real-time insights into customer engagement.

Support

INTEGRATED SERVICE MANAGEMENT

- Seamless Integration with Platform Modules
  - Automatically pull all the needed details for contextual case handling.
  - Enable direct case creation from any other module.
  - Facilitate coordinated resolution workflows across sales, support, and operations teams.
  - Leverage unified platform data sharing for best customer experience.
- Case Management and Issue Resolution
  - Provide a centralized system for tracking, prioritizing, and resolving customer and partner support cases.
  - Automate case routing.
  - Support multi-channel case creation.
  - Integrate all modules for contextual case handling.
- Knowledge Management and Self-Service
  - Offer a structured knowledge base articles and best practices.
  - Enable AI-driven recommendations for faster issue resolution.
  - Support customer self-service portals to improve satisfaction.
  - Allow dynamic content updates.

INTEGRATED SERVICE MANAGEMENT

- Service-Level Agreements (SLAs) and Performance Monitoring
    - Define and enforces SLAs to ensure timely and efficient support.
    - Track all SLA KPIs to maintain and improve service quality.
    - Provide real-time SLA dashboards and automate alerts for at-risk cases.
    - Ensure compliance with contractual obligations and industry best practices.
- Omnichannel Support and Customer Engagement
    - Integrate all input channels for seamless customer interactions.
    - Use AI chatbots and virtual assistants to handle common inquiries 24/7.
    - Enable contextual responses.
    - Provide a unified 360-degree view for analysts of the customer journey.
- Data and Analytics
    - Analyse case trends to drive product and service improvements.
    - Measure analyst and resolution efficiency and customer satisfaction.
    - Use predictive analytics to anticipate support needs.
    - Provide reporting on service quality and operational efficiency.

Request Demo

Unlock a world of opportunities
for your channel sales success

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