monday.com

A flexible CRM that works for you, not the other way around

Built on top of monday.com Work OS, **monday sales CRM** empowers you to manage and track your entire sales lifecycle, and get a bird's eye view of your team's progress to ensure you achieve your goals.

monday sales CRM

Where you and your customers come together

Capture and import leads, unify deal and contact information, centralize communication by integrating your Gmail or Outlook, record every interaction with customers, and build lasting relationships–all on one customizable platform.

- Lead management
- Account and contact management
- Opportunity management
- Sales forecasting
- Post-sales
- Sales operations
- Sales analytics
- Team goals

Quick setup and fast adoption

Give your sales team a no-code CRM they'll actually want to use. monday sales CRM makes it easy and intuitive to get set up quickly and customize almost anything to suit your business needs–no need for a developer.

- Migration of existing contacts, accounts, and opportunities
- Seamlessly integrates with your existing tools
- Tailor any sales pipeline, workflow, and process
- Get started with ready-made dashboards or simply build your own

1 **Automate manual work**
Automatically assign leads to reps, set reminders on upcoming activities, automate follow-ups based on time passed, and more.

2 **Boost team efficiency**
Save time with a centralized platform that instantly gives every sales rep, manager, and senior executive the tools and insights they need.

3 **Collaborate with stakeholders**
Build transparency and accountability by clearly assigning, communicating, and updating team members across departments at every stage.

4 **Access everything in one place**
From contact details to emails, activities, quotes, invoices, files and more—view, manage, and track it all from one centralized platform.

5 **Stay connected on the go**
Use the mobile app to increase response times wherever you are.

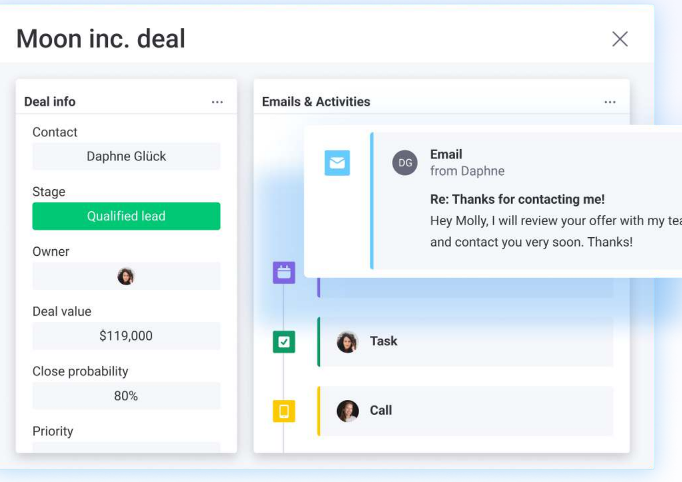
One place to manage every aspect of the sales process

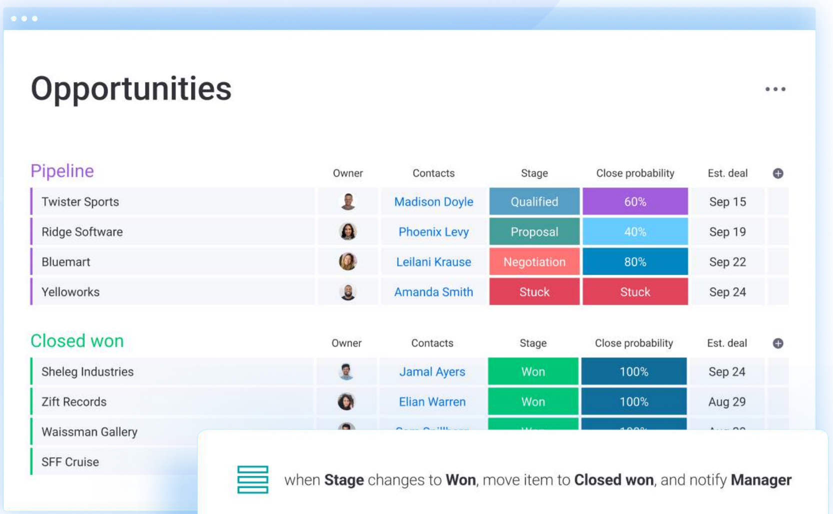
Lead management

Collect and manage inbound and outbound leads, centralize and qualify every lead in one place, and automatically score them based on custom criteria. Automate follow-ups and use email templates to communicate effectively with leads when they enter your funnel.

Account and contact management

Get a 360° view of your customers. Keep record of your contact and account information, log activities, and send emails—all from one place. Use a visual view to access all past interactions, opportunities, or projects they're associated with, and more.





Opportunity management

See where opportunities stand with a visual pipeline. Customize your pipeline without the need for a developer, drag and drop opportunities between stages, automate manual work, and track all contact interactions in one place.

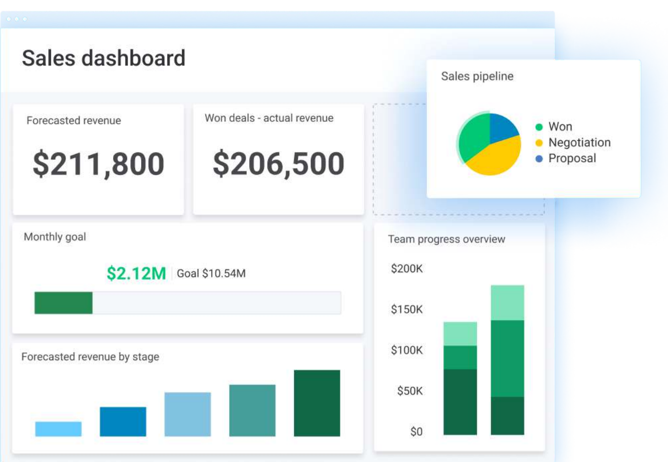
Sales forecasting

Keep track of your sales projections easily. Set the deal value and close probability, then leverage reports to track forecast vs. actual sales, and drill down forecast by month, sales rep, or any other criteria.

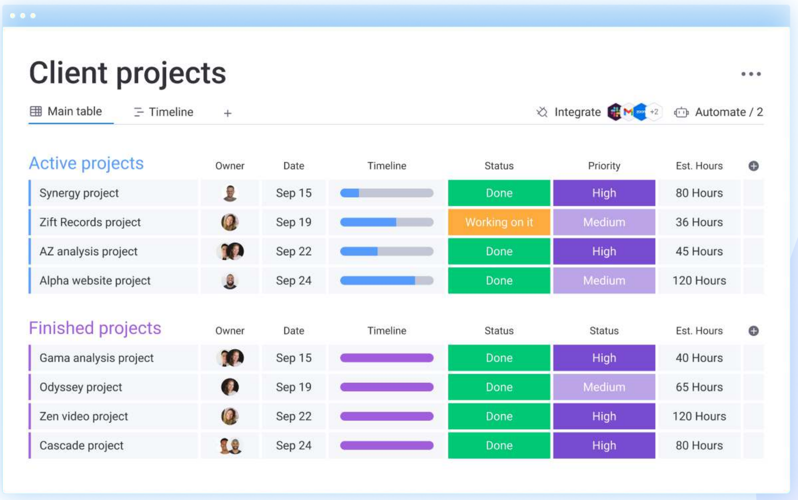
Real-time tracking and reporting

Increase visibility with customizable dashboards that instantly report your most important numbers and status updates.

Manage your team's funnel and quota attainment over time. Use advanced analytics to gain insights into your team's performance and activities, pipeline and revenue, expected collection, and more.



Take your team and customers far beyond the initial sale

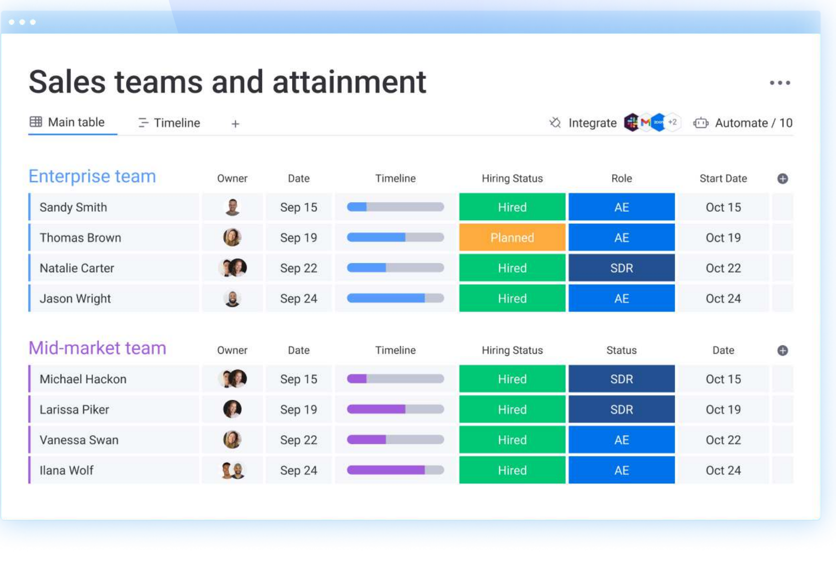


Post-sales

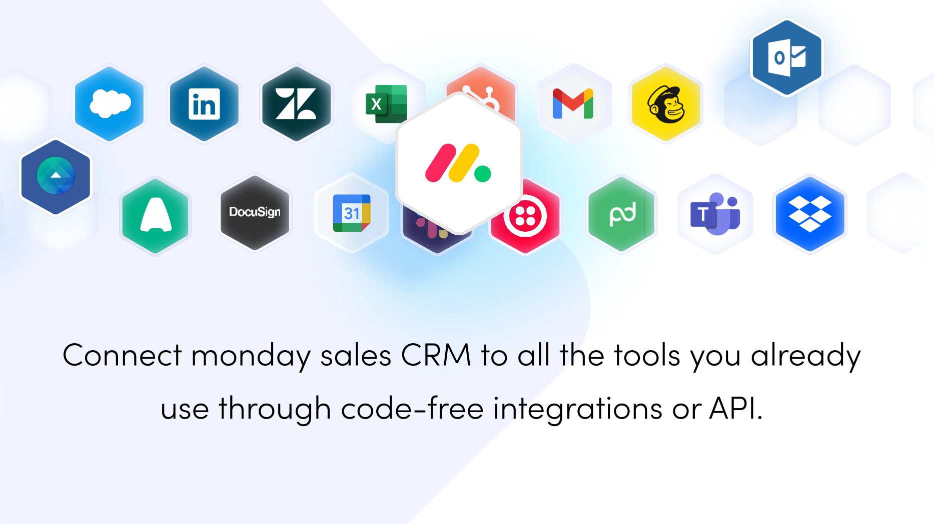
- **Account management**: Track the onboarding progress of your clients and manage renewals.
- **Client projects:** For every won deal, manage and track your client projects: calculate billable hours, send quotes, and collaborate with stakeholders across all teams.
- **Collection tracking**: Track your client collection status, get an overview of the expected collection, and easily spot where to put your attention.

Sales operations

- **Headcount planning:** Plan, track, and manage your hiring process to meet your goals on time.
- **Sales team onboarding:** Plan and run a smooth onboarding process for every new rep on your team.
- **Sales collateral:** Equip your sales team with up-to-date resources, knowledge, and sales materials to get them ready to start selling.
- **Documents for Sales:** Create a library of all the documents you need to close deals, including legal, security, financial, and more.
- **Legal and security requests:** Work with your legal and security teams in one secure place to review and update contracts and statuses.



Manage your entire sales pipeline without switching tabs



Connect monday sales CRM to all the tools you already use through code-free integrations or API.

Trusted by 127,000+ customers worldwide

"Our business development team can now send hundreds of emails a day directly (and automatically) from our CRM without lifting a finger. monday.com CRM has opened countless doors of opportunities that we never had before."

Kyle Dorman
Operations Department Manager
RoyWhite

Get started with monday sales CRM
Built on monday.com