Sanchay
CRM for Investment Gurus

Sanchay CRM

All In one CRM for Financial Advisors and Mutual Fund Distributors

#SanchayHaiToSahiHai

Agenda

What we will cover today

- Why we made Sanchay?
- How it is Different from Investment Platforms?
- How Sanchay is Making Difference?
- James Bond Moments
- Product Walkthrough
- Pricing & Plans
- Certification Courses
- Q&A

Why we made Sanchay?

A day in a life of Financial Advisors

Jobs to be done to
multiply the AUM

- Maintain customer database
- Handle customer requests/queries
- Lead/Enquiry Management
- Regular Portfolio reviews

Few Tools used by MFDs

Software which you might be using.

- Investwell
- Redvision
- Wealth Magic
- MF Central
- IFA Now
- Vijya Fintech
- Finsys

These are few of the Portfolio Management Software.

Portfolio Management Software are not CRM

They are used for managing investment and transactions, **NOT relations**.

But, Financial Advisory is all about Relationships

Sanchay CRM helps you build Relations,

thus your AUM

Current Challenges

Feedback from Financial Advisors

- Unstructured database, not usable for marketing or analysis
- Missed client queries, results in unhappy Clients
- Unstructured lead management, follow ups often missed.
- No reminders for portfolio review, generally missed.

How Sanchay is Different from Investment Platforms?

Guest Speaker

Paritosh Pandya

Director & Founder,

Moneyplant Financial Services

Guest Speaker

Milind Shah

Director,

Arthmitra Gurukulam

Sanchay CRM
Designed for MFDs

It Complements your Existing PMS & helps you manage sales, client relations, and back-office tasks

Where Sanchay Can Help?

Specifically Designed for MFDs

- AUM based client database.
- Help in Cross Selling
- Easy task management & analysis of team.
- Automated recurring portfolio review meetings, with reminders.
- Affordable and Easy solution.

How Sanchay is Making Difference?

Customer Success Story

Rakesh Singhal

Founder & CEO,

RKS Wealth India Pvt. Ltd.

Customer Success Story

Rajit Kothari

Executive Director,

Ashutosh Financial Services Pvt. Ltd.

Customer Success Story

Manoday Padhye

Head Of Technology,

Sapient Finserv Pvt. Ltd.

James Bond Moment - 1

Data Import Made Easy

Data Upload is Overwhelming!!

And Implementation Fails!!!

- It is a tedious process
- Configurations are required to upload
- Manually mapping fields
- No one is interested in doing this!

Powerful Features

Centralize Your Client Database

Centralize Your Client Database

Centralize and manage family, organization, and member-wise data in one place, accessible via web and mobile apps

- Effortless Data import through Readymade Templates
- Secured KYC & Document Management
- Smart AUM based Client Categorization
- Powerful Duplication Cleaning

Powerful Features

Efficiently Handle Customer Queries / Tasks

Efficiently Handle Customer Queries / Tasks

No Deadlines will be Overlooked. No Need of Sticky Notes, WA or Excel Task Mgmt

- Intelligent Auto Query Allocation to RMs
- Instant Notifications to Clients on Status updates
- Seamless Multi-Channel Query Management
- Automated Task Reminders to address queries on time

Track inquiries & follow-ups

Lead/Inquiry Management

Consolidate leads from all channels into one platform for seamless management and improved efficiency

- Smart Lead Auto Assignment based on Investment Type
- Reminder System to Ensure Timely follow ups
- Comprehensive Lead Funnel Visibility
- Effortlessly Setup Lead Nurturing Campaigns

James Bond Moment - 2

One Shoot WhatsApp Broadcast

Birthday & Anniversary

Engage Client to Strengthen Relationship

Efficiently manage communication, interactions, and personalized engagement

- Birthdays & Anniversaries

James Bond Moment - 3

Engage Clients on Their Birthdays & Anniversaries

Powerful Features

Streamline Portfolio Review Meetings

Streamline Portfolio Review Meetings

Effortlessly manage portfolio review meetings

- Smart Auto Scheduling of review meetings based on AUM categorization
- Auto Allocation of review Meeting to Respective RMs
- Auto Reminders to RMs to ensure review meeting are done timely
- Seamless Visit Tracking with Check-In/Check-Out System

Powerful Features

Complete Overview of your Business & Clients

Complete Overview of your Business & Clients

Get complete overview of your business and Client at your fingertips.

- Powerful OPR Dashboard for Owner, Managers & RMs
- Predefined Readymade Reports to Analyse different functions of your business
- Detect Cross Sell & Upsell Opportunities
- 360 Degree view of Client & Family Group

Coming Soon

So many new things under progress.

- CAMS/Karvy Integration
- Single click Import for every major platform.
- BSE Star MF Integration.
- AI based analysis and recommendations.

Other Benefits of Sanchay CRM

Effortlessly manage portfolio review meetings, set reminders, and auto-allocate visits for improved efficiency

- Web & Mobile Access
- API & Integrations
- Security & Restrictions
- Advanced Reporting
- Custom Workflows
- Implementation & Support

Two types of Plans

Standard and Growth

Standard

Growth

Centralised Customer Database

Standard

- Manage Family/Organization and Members
- CSV/Excel Import / Export

Growth

- Manage Family/Organization and Members
- CSV/Excel Import / Export
- RM wise Client visibility
- Document & KYC Management
- CAMS / Karvy Integration

Customer Query Handling

Standard

- Customer Query Management
- Internal/Back Office Task Management

Growth

- Customer Query Management
- Internal/Back Office Task Management
- Email to Query Auto Creation
- Rule based Allocation

Standard

Growth

Lead/Enquiry Management

Standard

- Lead Allocation
- Follow Up Reminders
- Lead Status/Funnel Visibility

Growth

- Lead Allocation
- Follow Up Reminders
- Lead Status/Funnel Visibility
- Event Management

Standard

Growth

Communication & Marketing

Standard

- Lead Allocation
- Follow Up Reminders
- Lead Status/Funnel Visibility

Growth

- Lead Allocation
- Follow Up Reminders
- Lead Status/Funnel Visibility
- Event Management

Standard

Growth

Streamlined Portfolio review meetings

Standard

- -
- -
- -

Growth

- Schedule recurring meetings based on AUM Categorisation.
- Reminders for missed or pending meetings
- Auto Allocation of visits to Respective RMs

Standard	Growth
Advance Features	
-	Roles and Permissions
-	Workflow & Automation
-	API Integration

Standard

Growth

Pricing

Standard

- Rs. 15000 p.a. (upto 20 users)
- Rs. 15000 one time implementation Charges
- Rs. 1000 p,a per user extra for additional charges.

Growth

- Rs 60,000 p.a (for 5 Users)
- Rs. 12,000 p.a for Additional Users
- Implementation (as SOW)
- Customisation & Integrations (as SOW)
- Data Migration (as SOW)

Reach us

We are nearer than you think.

- Sanchay Official Number (Call and WhatsApp)
  - +91 76930 07650
- Sanchay Sales Team
  - +91 76930 07650
- Sanchay Tech Team
  - +91 76930 07650

Certification Courses

Get Certified and Increase Sanchay Adaptation

enjay gurukul

All Courses

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49m

By Enjay Gurukul In Business, Sales

Enroll Course

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[Qualify to Close: Perfecting the CRM Lead Qualification Process]

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[Filling the Funnel: Effective Lead Generation Techniques for CRM]

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Licenses & certifications

CRM 101: Fundamentals
Enjay IT Solutions Ltd.
Issued Jan 2025 · Expires Jan 2026
Credential ID 2fb086009b959d4d

Show credential

Sangam CRM Fundamentals

CRM Admin Studio: Essentials
Enjay IT Solutions Ltd.
Issued Jan 2025 · Expires Jan 2026
Credential ID 6737dd4e8592bf3b

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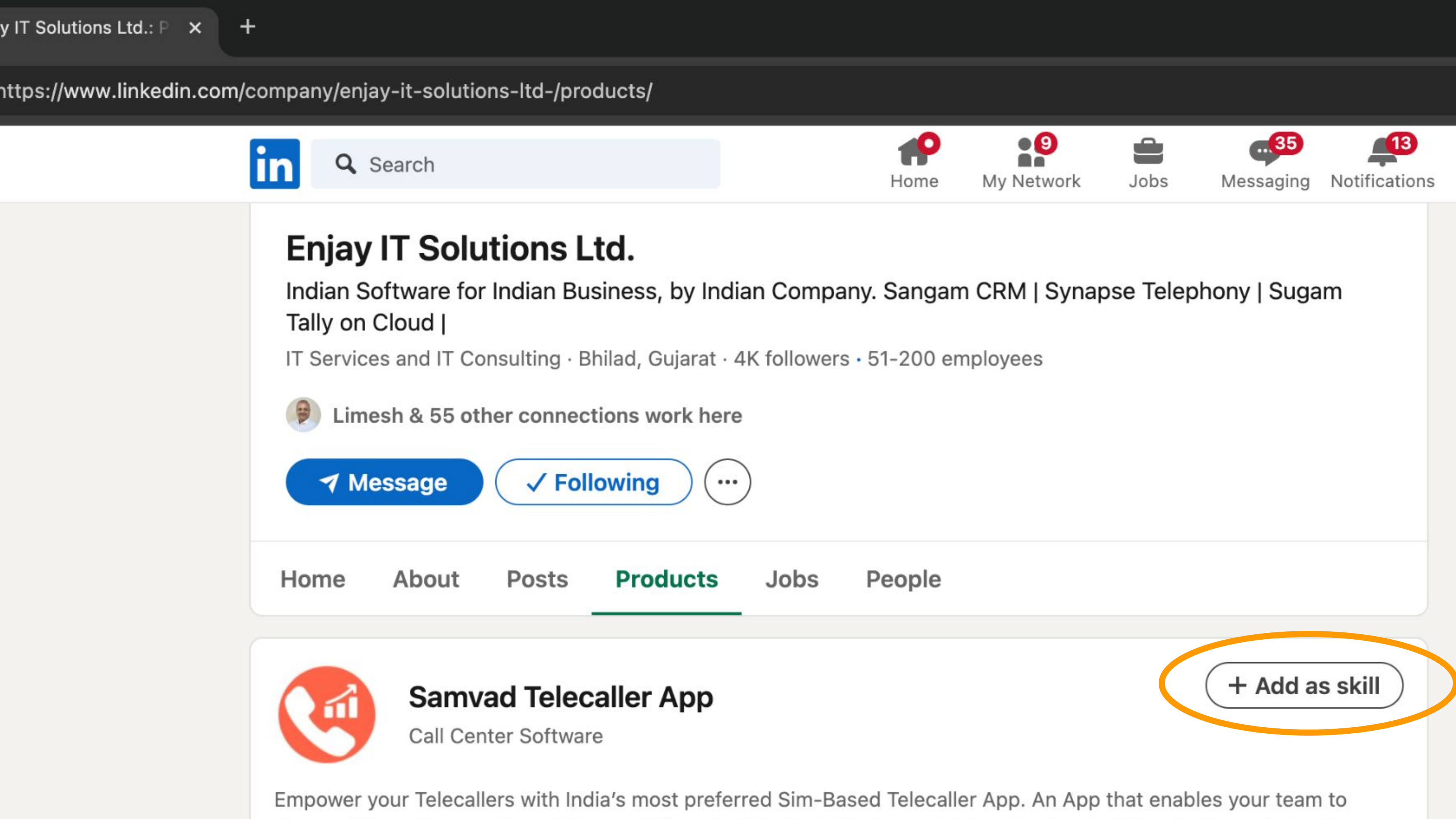
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Samvad Telecaller App
Call Center Software
+ Add as skill
Empower your Telecallers with India's most preferred Sim-Based Telecaller App. An App that enables your team to

Q&A