

EspoCRM For Sales Teams

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Building strong relationships with customers and prospects is the foundation of a successful sales operation and plays a critical role in long-term revenue growth and retention. In increasingly competitive markets, managing leads, communications, and deal stages across multiple opportunities can quickly become complex and time-consuming. Without the right systems in place, valuable opportunities can be missed, and pipelines can become difficult to control.

EspoCRM helps sales teams overcome these challenges by bringing the entire sales process into one central platform. Teams can store and manage customer and prospect information, track every interaction, and maintain full visibility of each opportunity from initial enquiry through to close. Automated follow-ups, pipeline stages, and personalised communications help sales teams stay responsive, prioritise effectively, and reduce manual administration.

By equipping sales teams with efficient, collaborative tools, EspoCRM enables better alignment, clearer forecasting, and faster deal progression. Improved visibility and structured processes support stronger decision-making, enhance the customer experience, and help organisations convert more opportunities into revenue, faster and more consistently.

EspoCRM Dashboards

Espo CRM
Search
+ Create Enquiry

- Home
- Calendar
- CRM
- Enquires**
- Contacts
- Accounts
- Meetings
- Jobs
- Opportunities
- Sales
- Quotes
- Invoices
- Sales Orders
- Products
- Activities
- Emails
- Tasks

Enquires

New	Assigned	In Process	Recycled	Dead
Joe Bushnell enable.services Jeff Bezos Amazon jb@amazon.com	James Bleeze enable jbleeze@enable.services Nord Herida Carol George Calm Sailing Inc carol.george@yahoo.co.uk Sally Thomas Julia Watkins Complete Holding julia.watkins@gmx.co.uk 680f8686e4e00899c Theresa Daniels Smallville Resources Inc theresa.daniels@gmx.co.uk Joseph Bushnell Katherine Austin AD Importing Company Inc	Gloria Reyes QR&E Corp gloria.reyes@aol.co.uk Sally Thomas Amanda Stephens T-Cat Media Group Inc amanda.stephens@yahoo.co.uk Sally Thomas Jacqueline George Smith & Sons jacqueline.george@yahoo.co.uk Sally Thomas Ann Banks Draft Diversified Energy Inc ann.banks@web.co.uk Sally Thomas Frances Hart Pullman Cart Company	Irene Vasquez 360 Vacations irene.vasquez@web.co.uk Sally Thomas Ann Gutierrez 247 Couriers ann.gutierrez@aol.co.uk Sally Thomas Amy Daniels 360 Vacations amy.daniels@hotmail.co.uk Sally Thomas Beverly Daniels Dirt Mining Ltd beverly.daniels@web.co.uk Sally Thomas Virginia Vasquez X-Sell Holdings	Linda Carroll Avery Software Co linda.carroll@hotmail.co.uk 680f8686e4e00899c Annie Shaw Riviera Hotels annie.shaw@outlook.co.uk 680f8686e4e00899c Amy Wagner Grow-Fast Inc amy.wagner@yahoo.co.uk 680f8686e4e00899c Evelyn Carr Pullman Cart Company evelyn.carr@outlook.co.uk 680f8686e4e00899c Bonnie Sims JBC Banking Inc

EsproCRM

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Search

+ Add +

+ Create Account

Home

Calendar

CRM

Enquires

Contacts

Accounts

Meetings

Jobs

Opportunities

Sales

Quotes

Invoices

Sales Orders

Products

Activities

Emails

Tasks

Accounts

All

1-50 / 128

Name	Website	Type	City	Assigned U...
sportsafe		Prospect		
Toysrus		Prospect		
Draft Diversif...	www.draftdiversified...	Prospect	Birmingham	Sally Th...
enable		Prospect		
Tesla		Prospect		Joseph ...
enable		Customer		
Hepco Motion	www.hepcotion.com...	Prospect		
BBC	bbc.co.uk	Prospect		
EnableIT Tec...	enable.services	Prospect		
Sea Region Inc	www.searegioninc.c...	Prospect	Leeds	Sally Th...
Riviera Hotels	www.rivierahotels.c...	Prospect	Leeds	Sally Th...
Rubble Group...	www.rubblegroupinc...	Prospect	Birmingham	Sally Th...
Q3 ARVRO III ...	www.q3arvrolii.co...	Prospect	Birmingham	Joseph ...

Map

Satellite

United Kingdom

Map data ©2025 GeoBasis CE/BKG (©2009), Google

Super Star Holdings Inc

Leeds

QR&E Corp

Tracker Com LP

Southern Realty & Corp. Inc

Underwater Mining Inc.

T-Squared Techs

[illegible][illegible]

enable.services Overview

Real people, **real solutions**, real results

LOCATION. Ipswich, United Kingdom

EST. 1994 Family Run

TEAM SIZE. 48 employees

CSAT SCORE.  Based on past 3 yrs.



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OUR SOLUTIONS AND CORE PARTNERSHIPS

CUSTOMER RELATIONSHIP MANAGEMENT
CASE & ISSUE MANAGEMENT
TASK & PROJECT MANAGEMENT
MARKETING AUTOMATION



IT AND NETWORK
SUPPORT SERVICES



Since
1994

AUTOMATION PLATFORMS

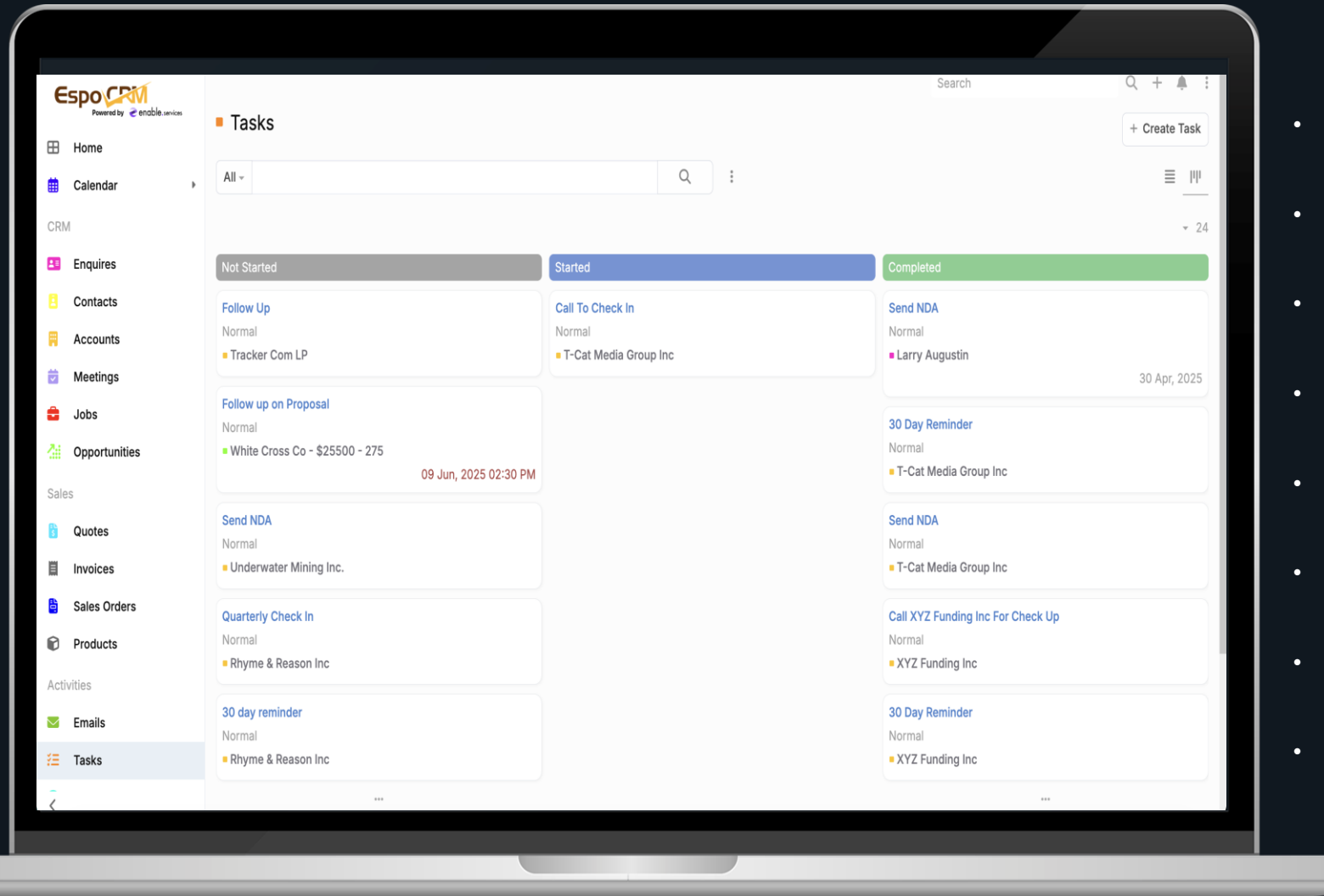


Since
2017

Since
2023

Since
2021

EspoCRM User Interface



- **User-Friendly Interface –**
A clean, intuitive interface is crucial for ease of use and adoption.
- **Highly Customisable Layout –**
Being able to tailor the system to specific business needs is a top priority.
- **Workflow & Automation Integration –**
Automating tasks saves time and improves efficiency.
- **Inline Editing for Efficiency –**
Quick edits without navigating away improve productivity.
- **Role-Based Access Control –**
Ensuring data security and access control is critical for businesses.
- **Dynamic Panels & Relationships –**
Helps organise related data effectively within records.
- **Real-Time Data Updates –**
Keeping information up-to-date is essential for accuracy.
- **Mobile-Friendly & Responsive Design –**
Accessibility on different devices enhances flexibility.
- **Tabbed Interface for Better Organisation –**
Reduces clutter and makes navigation smoother.
- **Dashlets & Widgets –**
Custom widgets provide quick insights but are more of an enhancement than a necessity.



Sales Management

- Manage and prioritise leads and opportunities within a clear, structured sales pipeline
- Customise sales stages to match your sales methodology using Layout and Entity Managers
- Automate routine sales tasks using Workflows and BPM to reduce manual administration
- Track opportunity progress with custom status fields, tags, and probability indicators
- Automate the creation and handling of sales requests, enquiries, and handovers
- Create secure customer and partner portals for collaboration and information sharing
- Use predefined use cases to standardise opportunity creation and sales processes
- Control access to sales data with configurable roles and portal security permissions
- Share sales playbooks, product information, and best practices through a central Knowledge Base

Analytics And Reporting

- Leverage powerful analytics and reporting to gain clear, actionable insights
- Evaluate event performance using Custom Reports
- Monitor key metrics in real time with Report Panels and Dashlets
- Export reports to Excel and CSV for further analysis and sharing
- Automate report distribution by scheduling results to be sent via email

Client Support

- Deliver better client support with streamlined service tools
- Provide self-service portals where clients can submit questions and requests
- Control access to EspoCRM data using configurable portal roles
- Track and manage all issues with full case history in the Cases module
- Automatically create cases from emails using the Email-to-Case feature

Sales Cycle Automation

- Streamline your process with sales cycle automation from lead to close
- Track and prioritise opportunities to focus on the most valuable deals
- Automate the creation and sending of quotes, sales orders, and invoices
- Manage products and services using configurable product catalogues
- Customise your sales pipeline with Entity and Layout Managers to match your sales process
- Forecast future revenue accurately with built-in revenue forecasting tools

Centralised Client List

- Maintain a centralised client database for Contacts, Leads, and Accounts
- Customise customer profiles using Entity and Layout Managers to match your processes
- Link meetings, tasks, calls, and emails directly to the relevant records for full visibility
- Quickly locate records using powerful search filters
- Import and export data easily to support seamless record migration
- Synchronise contacts with Google and Outlook using the optional

EspoCRM The Number One Open-Source CRM

Global Reach, World-Class Excellence



50,000 +
Companies
Using
EspoCRM



In 163
Countries
Of The
World

2014

10 Years
Since
First
Release



A Partnership Built On Trust

EspoCRM Wins
The Foss 20i
Awards 2025
In The CRM &
Support Category
For Solutions
That Make
Meaningful
Impacts On
Businesses



EspoCRM Wins
Software Suggest
Efficiency Award
2025 For
OutStanding
Peformance &
Innovation





- Consistent data hosting boasting 99.97% uptime over the last decade.
- Seamlessly integrate with various platforms, offering unlimited API calls.
- Located in a Tier 3 UK Data Centre, boasting ISO certifications.
- Receive swift online & phone support.
- Written in PHP, JavaScript, and Python.
- LAMP Stack.
- Benefit from network redundancy ensuring maximum data availability, coupled with frequent backups (on-site every 4 hours, off-site daily).
- Trusted CRM hosting since 2006. enableCloud: Secure, high-performance cloud hosting tailored for CRM and business applications.
- EspoCRM: Optimised hosting and seamless integration for EspoCRM, ensuring peak performance and reliability.

Consulting (Architect Design)

We recognise that each organisation is unique. Our approach involves collaborating closely with our customers to identify their goals, map processes, and catalogue pain points. This thorough understanding allows us to determine the most suitable EspoCRM products and implementation strategies, ensuring a tailored solution that meets each organisation's specific needs and optimises their business processes for improved efficiency and success.

Configuration (Build)

Our accredited experts configure, launch, and customise EspoCRM to exact specifications. We adapt the platform to meet unique organisational needs, improve business processes, and overcome obstacles identified during the consulting phase. By ensuring a tailored solution, we optimise performance and provide a seamless, efficient, and effective CRM system that drives business success and enhances overall productivity.

Customisation (Core Code)

Our accredited experts create custom code to meet the unique requirements of your organisation. By adapting EspoCRM to align with your specific business processes and addressing any challenges identified during consultation, we ensure a bespoke solution that enhances efficiency and effectiveness. This custom coding guarantees that EspoCRM integrates seamlessly into your operations, optimising performance and driving business success.

Data Migration (Alignment)

Our specialists ensure a seamless transition of your data to EspoCRM using CloverETL. We meticulously plan and execute the migration process, leveraging CloverETL's powerful data alignment capabilities to maintain data integrity and minimise disruption to your operations. This ensures that all critical information is accurately transferred and readily accessible in the new system, providing a smooth and efficient migration experience that supports your business continuity and success.

Integration (Automation)

We core code and integrate solutions into EspoCRM using core code and APIs such as REST and SOAP. Additionally, we employ our enableFlow solution with ApacheAirflow and work with middleware tools like Workato, Talend, Make, and Zapier. This enables integration with nearly any existing on-premise or web-hosted application software, including accounting, CMS, ERP, and eCommerce systems, ensuring a comprehensive and flexible CRM solution tailored to your needs.

Training (Onboard)

We design training programs for EspoCRM around customer deployments, requirements, and tailored software systems. By focusing on role-specific needs and emphasising hands-on experience and user adoption, we ensure the most effective use of time. Our training helps users quickly become proficient with EspoCRM, maximising the system's benefits and supporting successful implementation and utilisation within the organisation.

Support (Success)

We provide an industry-leading Success program that supports your deployment of EspoCRM from before going live and for as long as customers wish to engage with the service. This includes full account management, with comprehensive guidance and support, ensuring that your organisation maximises the value and effectiveness of EspoCRM. Our dedicated team is there every step of the way to ensure your success and satisfaction with the platform.

Why enable.services?

Proven Approach

- Extensive experience delivering successful CRM and systems implementation projects
- Deep expertise in open-source technologies
- CRM specialists with an average of 5–20 years' hands-on industry experience across the team
- Established, repeatable best practices for EspoCRM implementations, refined through real-world delivery

Proven On-Time, On-Budget Implementation Methodology

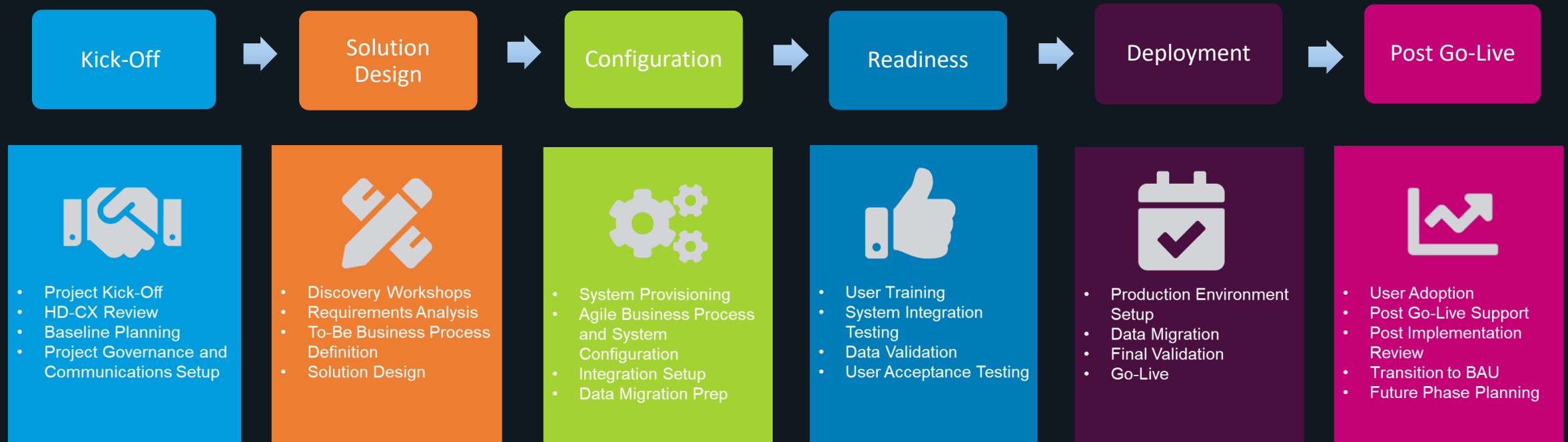
- Structured time-to-value delivery approach focused on rapid, measurable outcomes
- Dedicated project team support throughout every phase of the implementation lifecycle
- Ongoing support to accommodate evolving business requirements, including UK hosting and compliance needs

Well Connected

- enable.services' Projects Team works in close partnership with EspoCRM
- Ability to leverage internal EspoCRM teams, trusted partners, and specialist expertise to fast-track issue resolution
- Direct access to EspoCRM executive management, ensuring alignment, escalation, and long-term success

EspoCRM Implementation Mythology

- ✓ Consistent, repeatable methodology for end-to-end “HD-CX” project delivery
- ✓ Focused on client outcomes and user adoption
- ✓ Pre-defined activities, tools and templates for each step in the delivery cycle
- ✓ Rapid time-to-value (“let the platform do the work”)
- ✓ Defined project communication and governance model





UK 07:30 to 18:00 Monday to Friday



Before we can work out how quickly we need to respond to an issue, we first have to triage it and assign it a priority. Support operatives usually prioritise tickets based on the matrix below

Impact / Urgency	High Urgency	Medium Urgency	Low Urgency
High Impact	Priority 1 - Critical	Priority 2 - High	Priority 3 - Medium
Medium Impact	Priority 2 - High	Priority 3 - Medium	Priority 4 - Low
Low Impact	Priority 3 - Medium	Priority 4 - Low	Priority 4 - Low

Once a priority has been established for a ticket, we'll use the table below to work out the applicable time that will apply for the various stages of the ticket lifecycle.

Priority	Respond within*	Plan within*	Resolve within*
Priority 1 – Critical	2 hrs	4 hrs	8 hrs
Priority 2 – High	4 hrs	24 hrs	48 hrs
Priority 3 – Medium	8 hrs	50 hrs	70 hrs

EspoCRM with  **enable.services**

UK Hosted and Supported

