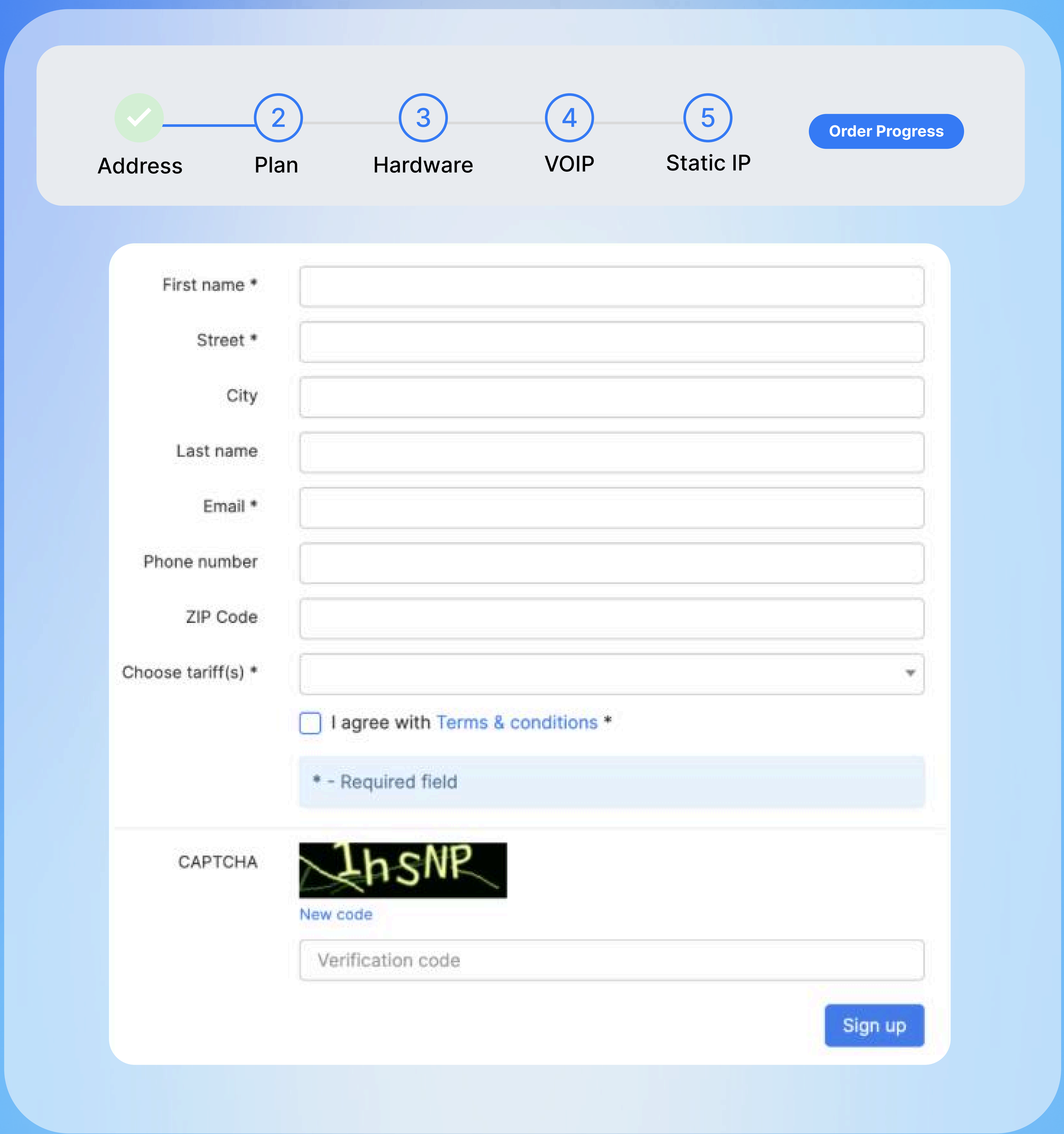
CRM for ISPs

Manage sales from quote to service fulfilment

When talking about CRM for ISPs, most modern solutions aren't geared toward telecommunications infrastructure. This guide outlines six ISP sales best practices using Splynx's telecom-ready CRM. It streamlines customer acquisition by automating lead intake and optimizing marketing at scale. Its purpose is to help you win customers more easily and **sell more efficiently**.

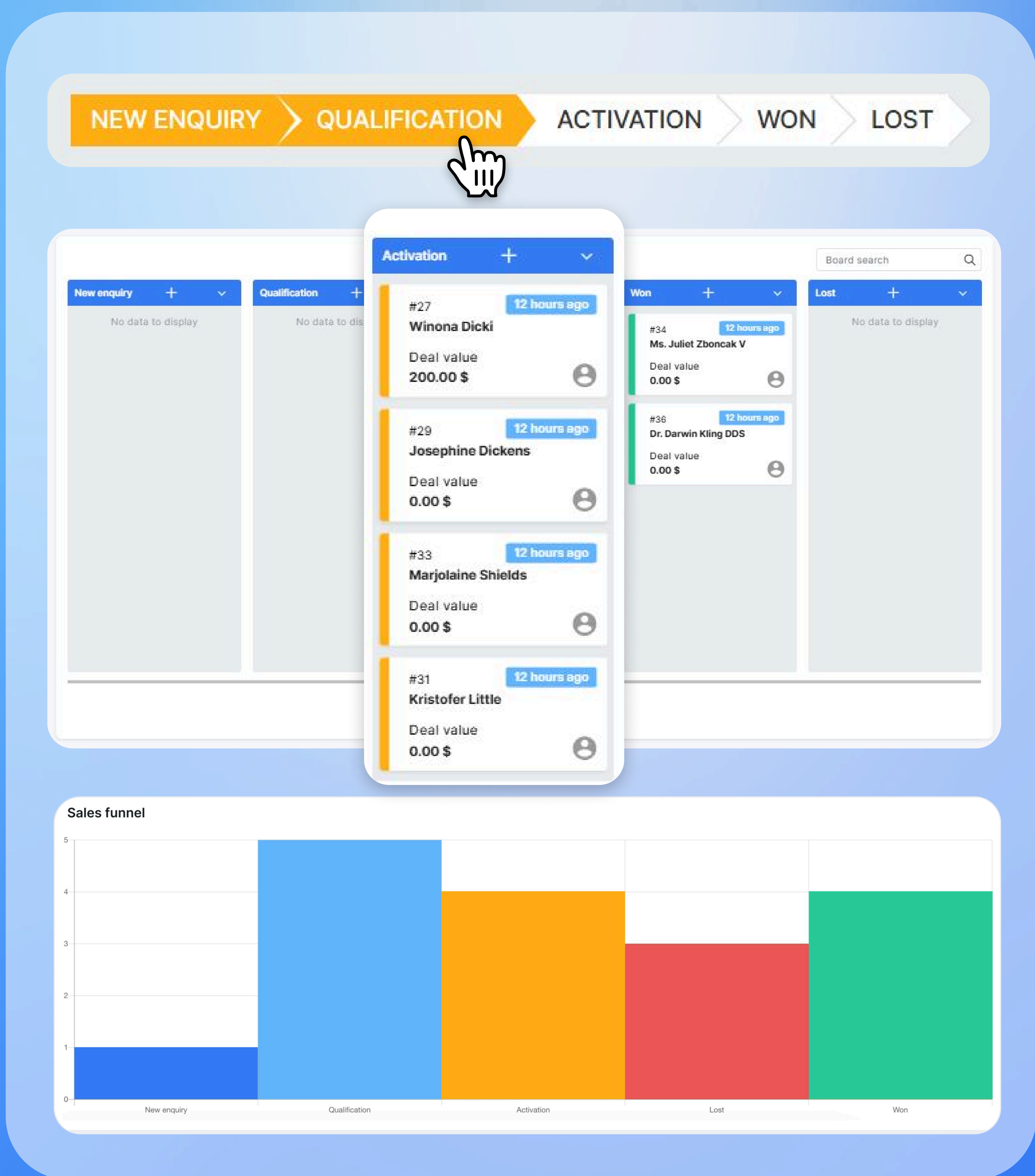


01. Capture and add every lead to the CRM automatically

- Prospecting for ISPs is no different from prospecting in any other industry: build a robust contact list. It starts at the moment of enquiry. If enquiries live in spreadsheets or saved emails, you lose visibility into your lead funnel and deal pipeline.
- With Splynx's built-in CRM, a self-registration or sign-up form with pre-qualification by address/service availability embedded on your website or landing page automatically grabs data and store in one place. Once a prospective customer submits an inquiry, the system creates a lead and triggers a notification a notification to the assigned admin, so follow-up begins on time with predefined procedures.
- Forms and all lead fields are fully customizable, and if you need a custom form with specific fields that exceed basic functionality (for example, bank account name/number with verification), Splynx can handle that too can and deliver it for you by a custom development project.
- Having all your leads and their data on one unified platform gives you the visibility needed to effectively manage prospecting and follow-ups from the very beginning.

02. Define your process with a clear lead funnel and deal pipeline

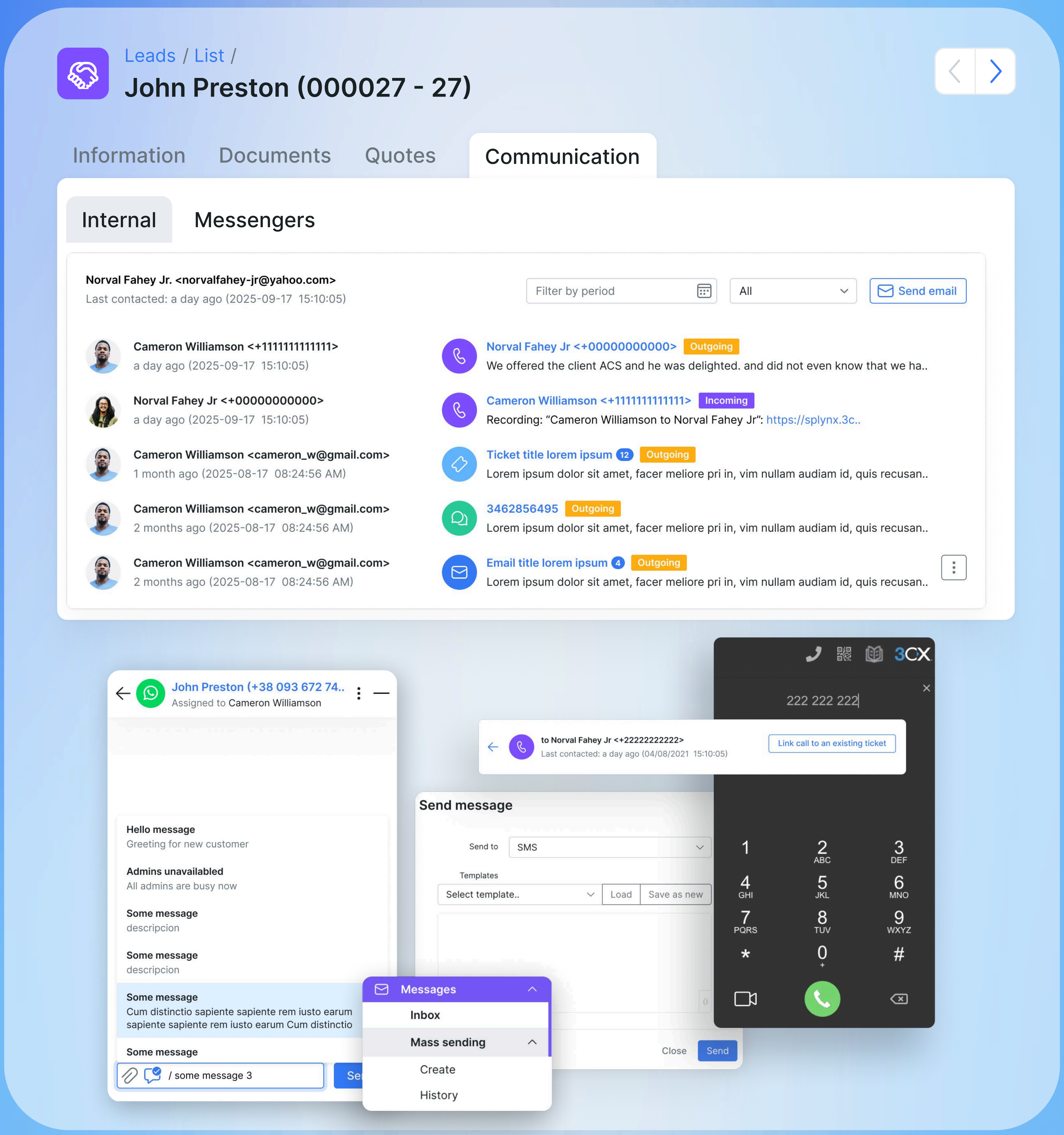
- You want a CRM that not only captures and stores lead data but gives you visibility into how each lead moves through well-thought-out lifecycle stages and that clearly delineates between a lead and an opportunity. And you would rather a CRM that gives you that kind of flexibility.
- In Splynx, you can leverage the leads pipeline with predefined stages and statuses to categorize leads according to where they really are in the lifecycle stage. And based on what stage you need to do certain things to get that lead from one stage to the next.
- And the reason that's important is because just because you have a conversation with somebody and they say are a marketing qualified lead, that doesn't mean they're an opportunity. They're not an opportunity until they hit certain other qualification points, so you avoid the "everything in a deals pipeline" mistake.
- Discipline drives accuracy. Every activity completed in the CRM requires a follow-up activity. You always have to have a next step, but that next step can't just be a "check-in". It has to be with value.



Why an omnichannel CRM matters for loyalty?

A seamless experience across channels is linked to retention. More than half of customers will switch to a competitor after just one poor interaction.

>50%
switch



03. All communication in one place

Some like calls, others prefer email, and many appreciate fast online chats in messengers. It's not just one call, email or texting. Every interaction counts. Good CRMs will have a component for calling as well as emailing within the platform, and it's as simple as connecting the CRM to your email tool (Outlook or Gmail). Set it up so you're capturing all activity in one dash, in one interface.

Splynx supports IMAP email and 3CX calling, and extends this with a chat widget for messengers (including WhatsApp Business) alongside SMS. And all communication through different channels is stored in one place and accessible from one screen instead of being scattered across separate tools.

Every message, call, and reply lands on the same lead profile, together with Tasks/To-Dos (including future and recurring tasks). You can see the last conversation, the next task, and the full context. This gives you better visibility into how you want to work those leads and keeps marketing stages from being skipped.

When you convert a lead to a customer, the full communication history remains accessible on their profile, preserving full context for sales, billing and support, keeping everyone on the same page.

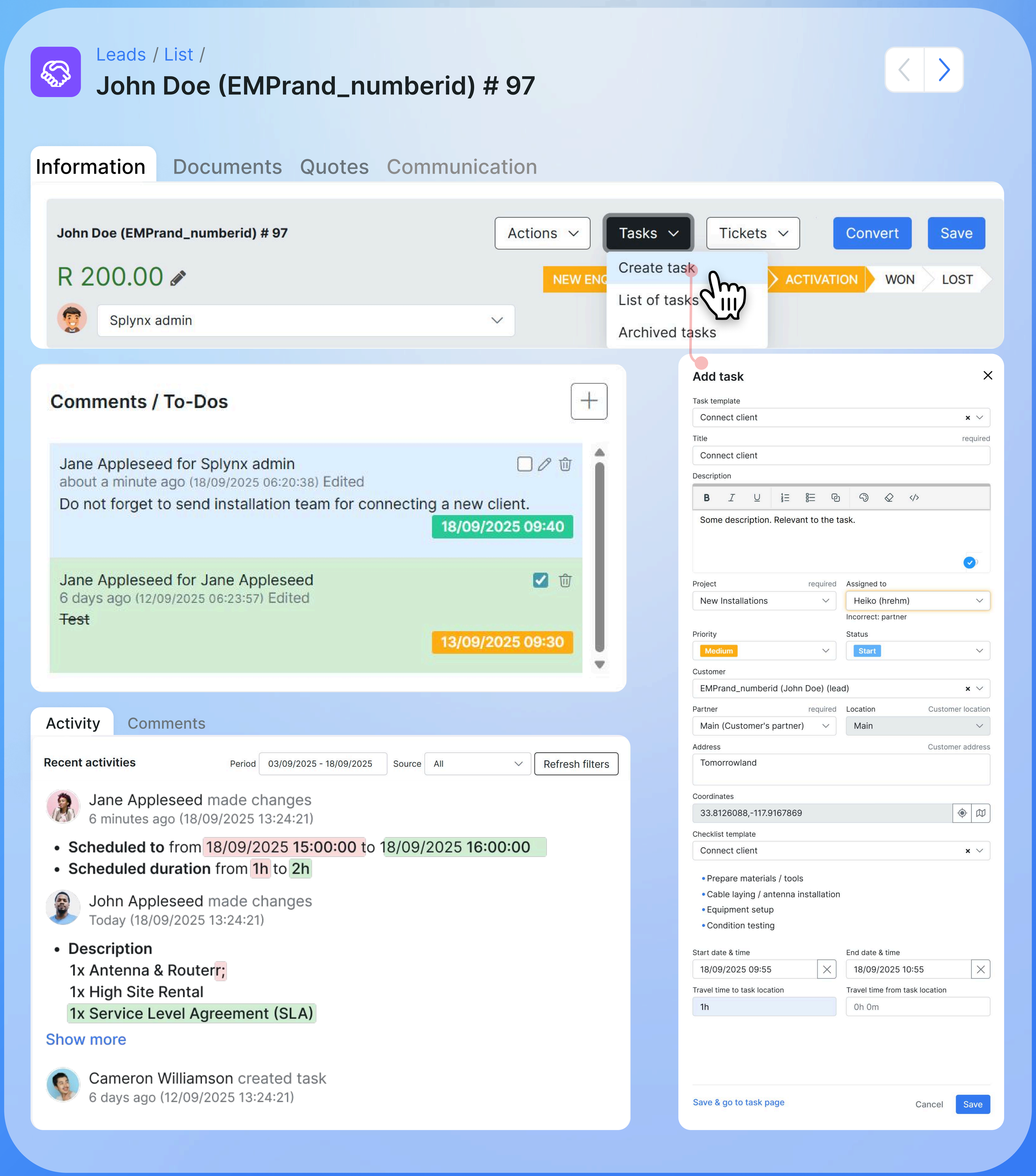
04. Connection to Tasks and Tickets

Any good CRM will let you create tasks, future tasks, repeated tasks and manage those activities from a singular interface. And that's really important. This gives owners and sales teams end-to-end visibility and execution to move a lead through the funnel to a customer.

Splynx CRM connects with the Ticketing and Scheduling modules. Once customers agree to proceed with your services, you need to connect them and assign right equipment. Splynx allows you to schedule a task for your installer directly on lead's CRM profile and move right hardware for task from Inventory.

You can use a Task template (for example, "connection of clients") with a checklist for repeatable work, then place it on the Scheduling board/calendar to coordinate site surveys or activation, without re-entering data after conversion.

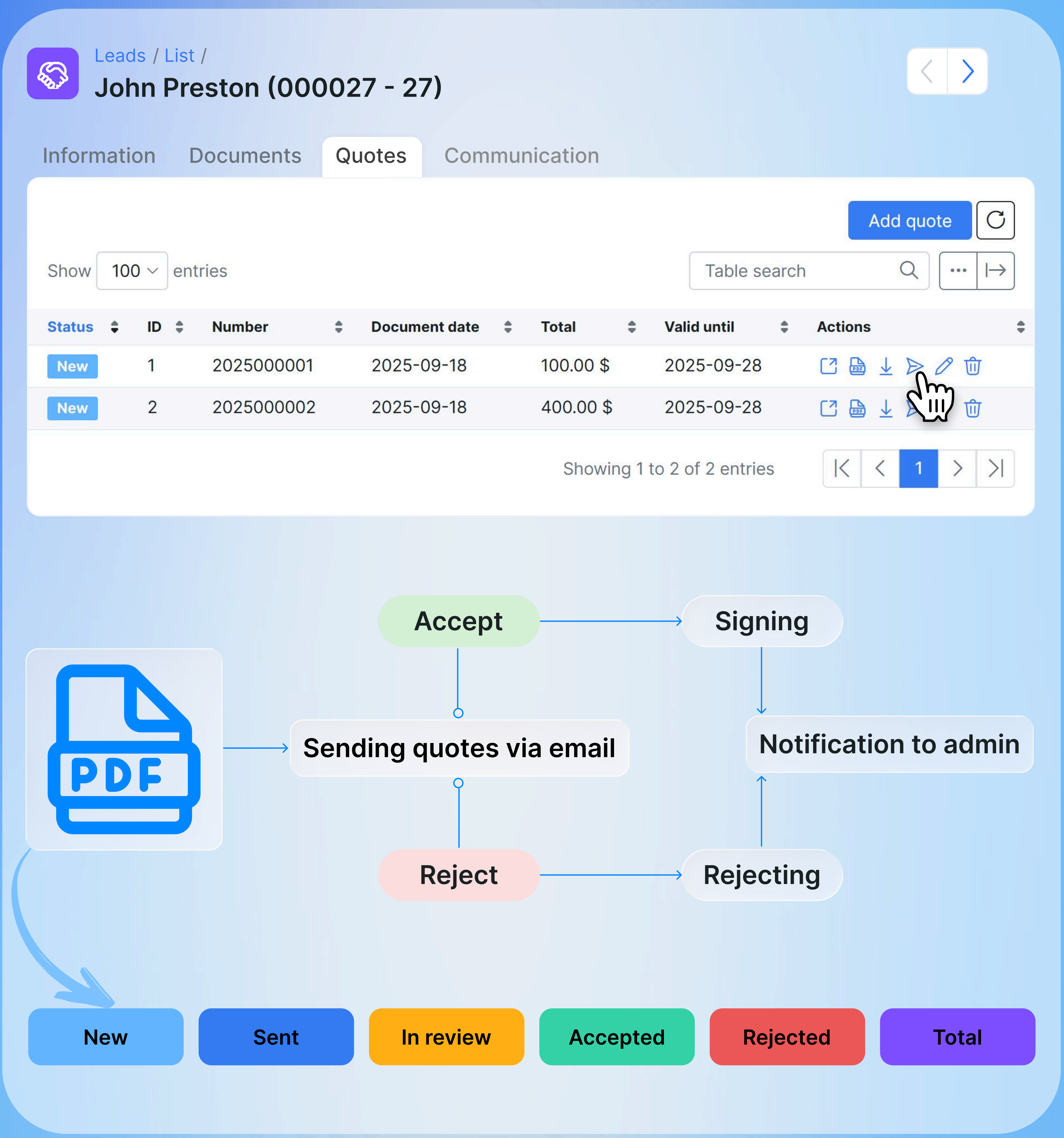
And if you use ticket communication with your client it will be linked both to lead and further converted customer profile. Because Tasks, Scheduling, Tickets, and email all live on the same record, the handoff from sales to operations remains continuous and visible in the lead funnel and the deal pipeline.



What kills satisfaction when teams don’t share context?

Customers expect consistent interactions across departments. When CRM gives agents a unified view, customers don’t have to repeat themselves and CSAT rises.

79%
expect it



05. Quotes that move decisions forward

- And speaking about quotes, working with which are a distinctive feature of every ISP tailored CRM, all quotes should live on the same record as the lead, be quick to create, simple to send and easy to track, so decisions move, not stall.
- In Splynx, you can work with quotes entirely inside the CRM: add services (internet, voice, recurring, bundles), set VAT and total value, then send quotes to leads by email with a link.
- When sending quotes to leads, you can use templates to format the content the way you want the quote to appear. Splynx updates the quote status automatically based on its progress and notifies the assigned admin, so sales know exactly where the decision stands without chasing screenshots.

06. Convert a lead to a customer in one click

- Connecting a new customer or providing services always requires paperwork. Every good CRM should support basic document workflows, not push you into a juggling act of downloading, re-uploading, and switching tabs. The goal is simple: automate contract signing and keep every document tied to service fulfillment, so sales and installers share the same source of truth.
- With Splynx’s CRM, you can upload an existing document or generate one from a predefined template, send it to the prospective customer, and get it back signed. All in a single flow. Once signed, their status is updated automatically, and both parties receive a confirmation email with the signed copy attached.
- When a quote is accepted, you can complete the paperwork without leaving Splynx and convert the lead into a paying customer in one click. Just click Convert to customer. Services and first invoice can be created automatically during conversion in one flow or later.
- The full history (all quotes, signature and communications) stays attached, so upgrades later are easy too: you can create a new quote from the customer profile for additional services without breaking the trail.