

# Raznameh Group

Optimizing HR Operations through Digital Transformation



R

Presentation - 2024

[www.raznameh.org](http://www.raznameh.org)





Raznameh  
GROUP



# About Our Company

Headquartered in London, Raznameh is a software development company leveraging optimized infrastructure and automated processes, to deliver high-quality digitalization services for Staffing and Recruitment Firms. Our strategy is not only to study the needs and requirements of you and your clients, but also to ensure that our digitalization solutions are specifically tailored to overcome your day-to-day challenges and enhance your operational capacity significantly.

With us, you are not just a client, but a business partner.



# Product Overview

## Self-Hosted CRM Systems



A CRM (Customer Relationship Management) system centralizes client management by consolidating all client interactions, data, and communications into a single platform. It allows for efficient lead tracking, helping to manage and nurture potential clients throughout the sales pipeline. In today's digital age, it's crucial to be cautious about where you store your data. Avoid sharing sensitive information on shared hosting platforms online, as advanced AI technologies can capture and analyze this data. To ensure the security and privacy of your information, always use secure and trusted solutions.



# No CRM?!

## Here's What Happens!



**Disorganized Client Data:** Without a CRM, you're probably juggling client information across different spreadsheets or files. Imagine updating contact details in one place and forgetting to do it in another. This inconsistency can lead to confusion and outdated info, which isn't ideal when you're trying to keep things streamlined.



**Difficulty in Tracking Interactions:** You might find it tough to keep track of all your client communications. For instance, if you're relying on email threads or sticky notes, it's easy to miss important follow-ups or forget the details of your last conversation. This could mean missing out on crucial client feedback or failing to address their needs promptly.



**Lack of Personalization:** Without a central system, it's harder to provide that personalized touch your clients appreciate. Imagine not remembering specific preferences or details from previous meetings when discussing new opportunities. It's those personalized touches that really show your clients you value their business.



**Limited Insight into Client Needs:** If you're not using a CRM to track client preferences and feedback, you might miss important cues about their changing needs. For example, if a client mentions upcoming hiring plans, you want to be ready with the right solutions. Without a CRM, staying on top of these changes can be challenging.



**Risk of Data Inaccuracy:** Using scattered systems for client data increases the risk of errors. It's crucial to keep client data safe and accurate to maintain their trust and comply with data protection regulations.



## Studies Suggest:

- 42% of service agents are unable to efficiently resolve customer issues due to disconnected systems, archaic user interfaces and multiple business applications
- CRM are known to improve customer retention, by as much as 27%
- 72% of CRM customers indicated they would trade functionality for ease of use

01

### Efficient Tracking of Interactions

Track all client communications easily. When a client calls, you can quickly reference your last conversation for seamless follow-up.

02

### Centralized Client Data

A CRM keeps all client information updated and accessible in one place. For example, when you update a client's contact info, it syncs across all platforms instantly.

03

### Enhanced Personalization

By tracking client preferences and history in your CRM, you can personalize every interaction. Whether it's remembering a client's hiring preferences or their preferred communication style, a CRM helps you build stronger relationships.

04

### Opportunity Identification

A CRM system highlights opportunities for upselling or cross-selling based on client interactions and preferences. For example, if a client expresses interest in executive search services during a conversation, your CRM can prompt you to follow up with tailored proposals.

05

### Insightful Client Analytics

With a CRM's reporting and analytics features, you gain valuable insights into client behavior and needs. You can identify trends, anticipate client requirements, and tailor your services accordingly. For instance, analytics might reveal that a client is expanding their operations, prompting you to proactively offer recruitment solutions for their growing team.

NEVER  
HIRING

# Product Overview

## Self-Hosted ATS System



An Applicant Tracking System (ATS) is a software application designed to streamline the hiring process for businesses. It automates the collection, sorting, and analysis of resumes, making it easier to manage job applications and candidate information. By providing a centralized platform for tracking candidate progress, scheduling interviews, and communicating with applicants, an ATS enhances efficiency, reduces hiring time, and improves the overall recruitment experience for both employers and candidates.



**HIRE ME**

# Your Challenges Without an ATS System



**Overwhelming Volume of Resumes:** Sorting through hundreds or thousands of resumes manually can be overwhelming. Imagine receiving a flood of resumes for a single job posting and having to sift through them one by one. It's easy to miss a star candidate simply because their resume got lost in the shuffle.



**Inefficient Candidate Screening:** Screening candidates for specific skills and qualifications becomes a slow, manual process without an ATS. Think about spending hours manually checking each resume for key skills, only to realize you've missed a few great candidates who slipped through the cracks.



**Lack of Centralized Candidate Information:** Candidate information might be scattered across different platforms and spreadsheets, making it hard to get a comprehensive view of each candidate's history. For example, you might have a candidate's resume in one file, interview feedback in another, and their status noted somewhere else entirely.



**Poor Communication with Candidates:** Keeping candidates informed about their application status and next steps can be challenging. Without an ATS, you might forget to update a candidate about their interview schedule, leading to frustration and a poor experience for them.



**Difficulty in Scheduling Interviews:** Coordinating interview schedules between candidates and hiring managers manually can be a nightmare. Picture spending your entire afternoon going back and forth with emails, trying to find a time that works for everyone, only to end up with double bookings or missed appointments.



**Inconsistent Candidate Experience:** Without a standardized system, the candidate experience can vary greatly. This inconsistency can lead to candidates feeling like they're not being treated fairly or that the process is unorganized, which isn't the impression you want to leave.

# Studies Suggest:

- 75% of recruiters believe their ATS has positively impacted their organization's hiring processes.
- Nearly 99% of Fortune 500 companies use ATS platforms regularly
- 70% of large and 20% of small and mid-sized businesses currently use ATS.

# Hiring!

## BENEFITS

### 01

#### Efficient Resume Management

With an ATS system in place, you enhance your resume management efficiency by seamlessly integrating it with your HR systems. It simplifies resume upload, categorization, and analysis, enabling you to swiftly identify top candidates through customizable filters.

### 02

#### Streamlined Candidate Screening

An ATS allows you to set specific criteria for skills and qualifications. For instance, you can filter candidates based on keywords or qualifications relevant to the job. This saves time and ensures you don't overlook qualified candidates who meet your criteria.

### 03

#### Centralized Candidate Information

All candidate information is stored in one place with an ATS. You can view a candidate's entire history, including resumes, interview feedback, and communication history, in a single interface. This ensures everyone on your team has access to the same up-to-date information.

### 04

#### Improved Communication with Candidates

An ATS automates communication workflows, sending personalized emails to candidates about their application status or interview schedule. For example, candidates receive timely updates on their application status, enhancing their overall experience and reducing frustration.

### 05

#### Consistent Candidate Experience

With standardized workflows and communication templates, every candidate receives the same level of professionalism and attention. This consistency enhances your employer brand and ensures candidates have a positive experience throughout the recruitment process.



# Product Overview

## Collaboration platforms



# Collaboration



A collaboration platform is a centralized tool that enhances teamwork by facilitating real-time communication and information sharing among team members. It integrates instant messaging, video conferencing, and file sharing to streamline collaboration, improve transparency, and boost productivity. Whether for project management or remote work, these platforms are crucial for modern businesses looking to optimize communication and enhance overall efficiency.





# ... and without a reliable Collaboration platform?



**Keeping Track of Team Conversations:** Without a Collaboration Platform, staying on top of team discussions and updates can be a challenge. You might find key details buried in lengthy email threads or scattered across different chat apps, slowing down decision-making.



**Managing information sharing and Feedback:** Sharing important information and providing timely feedback becomes a hassle. Imagine juggling multiple versions of documents via email, which can lead to confusion and delays in processing candidates or closing deals with clients.



**Tracking Client Interactions:** Without a centralized system, keeping a record of client communications is challenging. You might struggle to remember client preferences or provide timely updates on candidate submissions and project statuses.

## Studies Suggest:

- Businesses using collaboration tools experience a 30% reduction in time spent on meetings.
- Work tasks are over 50% more efficient in collaborative environments compared to solo work
- 89% of employees believe that effective communication is crucial for business success.



## BENEFITS

01

### Streamlined Team Communication

A Collaboration Platform consolidates team discussions in one place. You can easily follow and participate in conversations about clients' needs without toggling between different tools.

02

### Enhanced Security

Using a secure collaboration platform ensures that only you and your employees can access and control sensitive data. It combines the features of a standard collaboration platform with enhanced security, allowing for secure calls, group meetings, and rapid document sharing among team members.

03

### Enhanced Team Collaboration

Using an efficient collaboration platform allows you to communicate information faster, ensure progress tracking, and keep everyone informed. Team members receive notifications, update progress in real-time, and collaborate effectively to achieve shared goals.

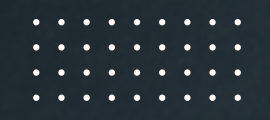


# Product Overview

## Task Management platform

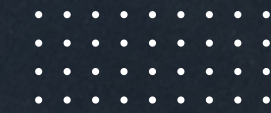


A task management platform for staffing and recruitment businesses is a vital tool designed to streamline and optimize your workflow. It centralizes task assignments, deadlines, and progress tracking, ensuring that your team stays organized and on top of all recruitment activities. From sourcing candidates and scheduling interviews to managing client communications and follow-ups, this platform enhances efficiency and collaboration. By providing real-time updates and easy access to critical information, it helps recruitment businesses stay coordinated, reduce administrative overhead, and focus on what matters most—finding the right talent for your clients.





# ...and without a Task Management platform?



**Disorganized Workflows:** The absence of centralized tracking and prioritization tools can lead to disarray in recruitment, missed opportunities like discussing a potential candidate with a client, and other inefficiencies in recruitment and onboarding processes. Implementing a task management system is crucial for improving overall operational efficiency in HR management.



**Increased Stress:** When tasks are not clearly defined and tracked, it can lead to increased stress for team members. They may feel overwhelmed by the amount of work they have to do, or unsure about what they should be focusing on.



**Tracking Client Requirements:** Without a structured system, it's challenging to track and fulfil specific client requirements. You might miss important details in client briefs or fail to update clients promptly on candidate progress, risking client satisfaction and retention.



**Inability to Forecast and Plan:** Task management systems often provide tools for forecasting and planning based on past performance. Without these tools, it can be more difficult to plan for the future and anticipate potential challenges.



# Studies Suggest:

- The global task management software market is projected to reach USD 4,535.5 million by 2026, growing at a CAGR of 13.3%
- 75% of people experience weekly stress due to increasing task loads and lack of time



## BENEFITS

### 01

#### Resource Optimization

Ensure that projects are completed effectively without overextending the team or budget, contributing to overall operational efficiency.

### 02

#### Monitoring Progress

By regularly tracking task completion and making necessary adjustments, HR teams can maintain efficiency, address any delays promptly, and ensure smooth operations in recruitment process.

### 03

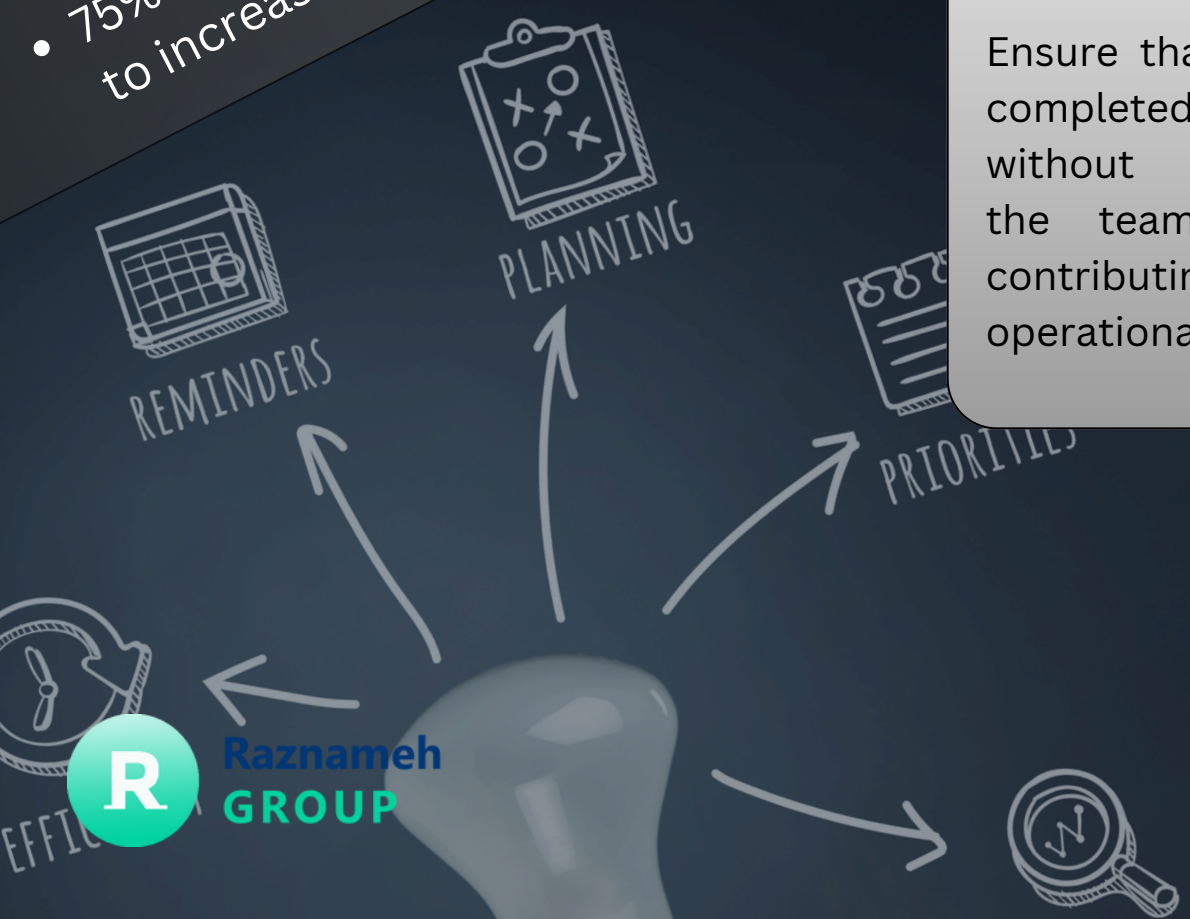
#### Enhanced Client Communication

Keep clients informed and satisfied by tracking their specific requirements and progress updates in one place. You can provide timely updates on candidate submissions, share interview schedules, and respond promptly to client inquiries, fostering trust and satisfaction.

### 04

#### Defining Tasks and Projects

Task definition involves breaking down projects into smaller tasks and clearly specifying the purpose and scope of each task, ensuring that team members understand their specific responsibilities, leading to better organization and more efficient project execution.



# Product Overview

## Sales Management System



A sales management system is a software solution designed to streamline and enhance the sales process within an organization. It provides a centralized platform for managing customer relationships, tracking sales opportunities, and monitoring the performance of sales teams. By automating routine tasks, quotes, payments, generating invoices and reports, and facilitating effective communication, a sales management system helps businesses improve efficiency, increase sales, and build stronger customer relationships. It is an essential tool for optimizing sales operations and driving revenue growth.

*Sale*



Shift



# How does it look without a proper Sales Management System?



**Manual Data Entry:** Without a dedicated system, you're spending loads of time manually entering client and candidate details. You're on the phone with a client who urgently needs invoice details. You frantically search through papers, trying to find the right document.



**Inconsistent Quotes:** Manually crafting quotes leads to inconsistencies and errors, resulting in misunderstandings or lost trust. You quickly create a quote but forget the payment terms, leading to multiple emails to clarify and delaying the process.



**Delayed Invoicing:** Manual invoicing causes delays, affecting cash flow and client relationships. You finally send invoices after a hectic week, only to realize you missed a billing period, risking client disputes over late fees.



**Payment Chasing:** Without online payment options, you're stuck chasing checks or waiting for wire transfers, causing delays and frustration. You spend hours following up on an overdue payment, and the client promises to send a check, which could take another week to arrive.



**Lack of Insights and Reporting:** Without a centralized system, tracking sales performance and understanding client behavior is challenging, hindering business growth. Difficulty arises in preparing monthly sales reports due to scattered data across multiple spreadsheets and documents.



## Studies Suggest:

- Automate payables to reduce workload by 80%, speed up financial close by 25%, and cut payment errors by 66%, ensuring scalable operations and better financial control.

- On average, 49% of online businesses get their invoices paid within 24 hours.

- Implementing a sales management system has resulted in a 73% boost in business efficiency

01

### Enjoy Streamlined Processes

Streamline operations by automating quote, invoice, and payment reminder creation. Quickly generate precise client quotes by selecting services from a dropdown menu, letting the system calculate totals automatically, saving you time and reducing errors.

02

### Improved Accuracy and Consistency

Use templates and predefined workflows to ensure every quote and invoice is accurate and consistent. Your client receives a professionally formatted invoice that includes all agreed services and fees, enhancing their trust in your business.

03

### Benefit from Faster Invoicing and Payments

Integrated online payment options allow clients to pay invoices with just a few clicks, speeding up the payment process. Your client receives an invoice via email with a secure payment link, pays immediately, and you get notified of the payment within minutes.

04

### Gain Data-Driven Insights

Built-in reporting and analytics give you valuable insights into sales performance and client behaviour, helping you make informed business decisions. You review a monthly sales report that highlights top performing services and identifies trends, enabling you to adjust your strategy and improve performance for the next month.

## BENEFITS



# Product Overview

## E-Mail Marketing System



An email marketing system is a powerful tool for businesses to create, automate, and analyze email campaigns. It allows you to efficiently manage your email marketing efforts by providing features like email template creation, campaign scheduling, subscriber list management, and performance tracking. This system helps you reach your audience effectively, nurture leads, build customer relationships through personalized communication, and measure campaign success with detailed analytics. Whether you're sending promotional offers, newsletters, or event invitations, an email marketing system streamlines your marketing efforts and enhances your overall engagement with customers.



1



# Why is it hard to work without a reliable E-Mail Marketing System?



**Manual Outreach and Follow-Ups:** Without an email marketing system, you're manually sending emails and following up with candidates and clients. This can be time-consuming and prone to oversight. Imagine emailing each candidate about new job openings individually and then manually tracking who responded and who needs a follow-up.



**Limited Personalization:** Personalizing communication becomes challenging when you don't have an email marketing system to segment your audience based on interests or job preferences. You might send generic emails to all candidates about job opportunities without tailoring the message to their specific skills or career goals.



**Difficulty in Tracking Engagement:** Tracking email engagement metrics like open rates and click-through rates is cumbersome without an email marketing system. This makes it hard to gauge candidate interest in job openings or assess the effectiveness of your recruitment campaigns.



## Studies Suggest:

- Email marketing has an average return on investment (ROI) of \$36 for every \$1 spent
- 79% of marketers consider email one of the top three most effective marketing channels
- 44% of online shoppers say that emails influence their purchasing decisions

# E-MAIL MARKETING

## BENEFITS

01

### Personalized Communication

Easily segment your audience and send personalized emails based on candidates' skills, job preferences, or clients' specific needs. You can send tailored job recommendations to candidates, enhancing their engagement and increasing the likelihood of successful placements.

02

### Detailed Analytics and Reporting

Access comprehensive analytics to measure the success of your email campaigns. You can see which job postings are most popular, which emails drive the most responses, and use this data to make informed decisions and optimize your recruitment efforts.

03

### Efficient List Management

Manage your candidate and client email lists effortlessly, ensuring accuracy and reducing duplicates. You can easily add new contacts, segment lists, and keep your database organized, so you never miss sending an important email to a potential client or candidate.

04

### Engagement Tracking

Track key engagement metrics like open rates and click-through rates to understand how candidates and clients interact with your emails. This helps you gauge interest and refine your strategies. For instance, if a job posting email has a high open rate but low click-through rate, you can adjust the job description or call to action.



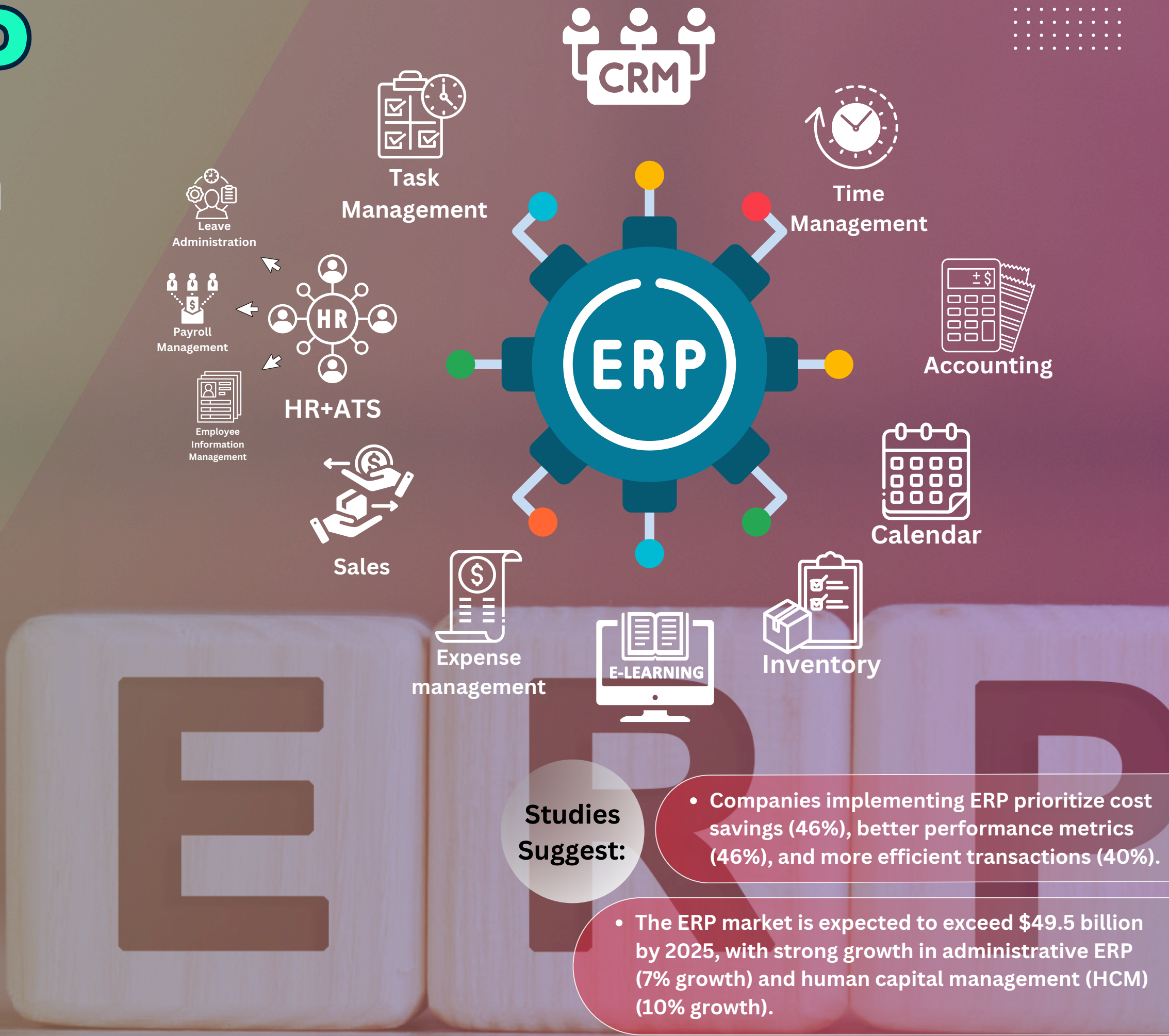
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# ERP

## Comprehensive Solution

### Product Overview

If you're in need of a comprehensive solution, Raznameh can provide a robust ERP. An **Enterprise Resource Planning (ERP)** system integrates and manages core business processes such as ATS, CRM, HR, accounting, sales, inventory, , time management, task management, etc. centralizing data to streamline operations and improve decision-making. With real-time visibility, an ERP enhances productivity, reduces costs, and boosts overall performance. Whether on-premises or in the cloud, ERP systems are essential for unifying processes and gaining a competitive edge. A self-hosted ERP offers greater security and full customization to meet your specific business needs.



### Studies Suggest:

- Companies implementing ERP prioritize cost savings (46%), better performance metrics (46%), and more efficient transactions (40%).
- The ERP market is expected to exceed \$49.5 billion by 2025, with strong growth in administrative ERP (7% growth) and human capital management (HCM) (10% growth).

# Get In Touch With Us

You need assistance? For any questions please feel free to contact us at:



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A large, stylized white letter 'R' is centered within a circular graphic. The 'R' is set against a teal-to-green gradient circle, which is itself surrounded by a white dashed border. This entire graphic is set within a larger black circle, which is further enclosed by a white dashed border. The background of the slide features abstract purple and blue curved shapes.

WE ARE HERE TO

# Bring Your Idea To Reality

**Mohsen Niknam**

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**Thank You**  
For Your Attention



**Raznameh**  
**GROUP**

More Information: [CLICK HERE](#) 

[www.raznameh.org](http://www.raznameh.org)





# Raznameh Group

Modernizing Company Formation through Digital Innovation



R

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# About Our Company

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# Product Overview

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A large, glowing orange 'CRM' logo is centered within a circular frame. A hand is shown holding a glowing orange ring that encircles the text. The background is dark with blue light trails and icons of a calendar and an envelope. A keyboard is visible at the bottom of the frame.

CRM

# No CRM?! Here's What Happens!



**Client Information Management:** Without a CRM, tracking client preferences, communication history, and project details is challenging, leading to missed opportunities and misunderstandings. Manually updating records across multiple spreadsheets often results in discrepancies and outdated information.



**Follow-Up and Communication:** If you don't respond to potential clients promptly, they might look elsewhere, impacting your conversion rate. Without a system to log follow-up tasks, you and your team might forget crucial steps, leading to confusion or delays.



**Document Management:** Without a unified system, you might face delays in retrieving contracts and struggle with version control. Storing documents in different places increases the risk of data breaches or loss, compromising client confidentiality and trust.



**Client Onboarding:** Without automated processes, you may face delays in receiving critical information or documents, impacting your initial impression and satisfaction. Inconsistent procedures across team members can lead to varying experiences, affecting your retention and referral rates.



**Reporting and Analytics:** Without robust analytics, you might miss key trends in client acquisition or conversion rates, making it harder to plan strategically and grow. Inaccurate or outdated metrics could lead to decisions that affect how you allocate resources or approach marketing strategies.



**Task and Workflow Management:** Without task prioritization, you may overlook urgent tasks, impacting project timelines and client deliverables. Inadequate tracking could lead to duplicated efforts or miscommunication among your team, causing delays or errors.



## Studies Suggest:

- 42% of service agents are unable to efficiently resolve customer issues due to disconnected systems, archaic interfaces and multiple business applications
- CRM are known to improve customer retention, by as much as 27%
- 72% of CRM customers indicated they would trade functionality for ease of use

01

### Keep everyone on the same page

Automate welcome emails, document requests, and task assignments. It makes onboarding new clients super easy and professional, freeing up your team to focus on more strategic tasks.

02

### All client details in one spot

No more hunting through spreadsheets! You can quickly find client info like contacts, business needs, and project history. It keeps everything organized and accurate, making client interactions smoother.

03

### Handle sales and finances seamlessly

Manage your products, create quotes, send invoices, and track payments—all within the CRM. It streamlines your transactions and keeps client interactions smooth and professional.

04

### Make smarter decisions with data

Our CRM gives you detailed reports on client acquisition rates, service performance, and financial forecasts. It's like having a crystal ball for planning and improving your company formation services.

05

### Never miss a potential deal again

Our CRM helps you track leads from start to finish. You can tag leads, assign them to your team, and set up automatic follow-ups. It's all about keeping those opportunities moving forward without dropping the ball.

06

### Streamlined Document Management

Store all your important client docs securely in the CRM. It makes retrieving and managing contracts and paperwork a breeze, which is crucial during the company formation process. (Contact details, quotes and invoices, emails, client messages and communications related to quotes, etc.)

## BENEFITS

# Product Overview

## Collaboration platforms

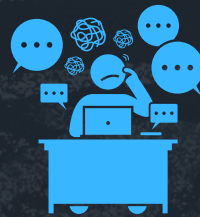


Collaboration platforms facilitate seamless communication and project management within financial services firms. These platforms provide a centralized hub for team members to share documents, collaborate on tasks, and coordinate projects in real-time. They also allow you to manage website channels and collaborate with clients. By breaking down communication barriers and fostering collaboration, these platforms enhance efficiency and productivity across teams.

# ... and without a reliable Collaboration platform?



**Messy Communication:** Keeping track of all your team's conversations through endless email threads and messages is a tough job to handle. Important updates about your client's company formation process might get lost, causing delays.



**Inefficient Document Sharing and Management:** Not having a self-hosted platform spot for documents could end up sharing things like contracts and legal forms on unsecure platforms where multiple versions are floating around. This would easily create confusion and disrupt your productivity.



**Security Risks:** Sharing sensitive client documents through unsecured collaboration channels like personal email or public messengers can be risky. There's always a chance of a data breach if your system is not self-hosted.



**Inefficient Client Onboarding:** Without a centralized platform, your employees exchange paperwork via email or physical copies. The lack of real-time updates and automated workflows delays the onboarding process, affecting client satisfaction and revenue generation.



## Studies Suggest:

- Businesses using collaboration tools experience a 30% reduction in time spent on meetings.
- Work tasks are over 50% more efficient in collaborative environments compared to solo work.
- 89% of employees believe that effective communication is crucial for business success.

01

### Enhanced Client Interaction Tracking

Keep a comprehensive log of messages for full context, allowing you to quickly reference past conversations, accurately follow up on requests, and provide personalized service.

02

### Increased Security

Thanks to a self-hosted collaboration platform, you can securely share and manage sensitive documents while enhancing team collaboration. This collaborative approach reduces the risk of data breaches and keeps client information safe.

03

### Centralized Communication

Keep all team conversations and updates in one place, avoiding endless email threads. Imagine having all discussions about client requirements, and progress updates easily accessible and organized, ensuring everyone stays in the loop and nothing gets lost.

04

### Efficient Document Management

Share and manage all documents from a single platform. No more confusion over multiple versions or searching through email attachments. Communicate smoothly via your own chat rooms and plan calls and meetings to share the newest updates or documents all in one place.

# BENEFITS





# Product Overview

## Task Management platforms



Task management platforms are essential tools for modern financial services and accounting firms, designed to streamline the process of assigning, tracking, and managing tasks. These platforms enhance productivity by providing a clear framework for task delegation, deadline management, and team collaboration, ensuring that every task is completed efficiently and on time.



# ...and without a Task Management platform?



**Disorganized Task Assignment:** Oftentimes, trying to keep track of too many moving parts at the same time seems just impossible. Without a clear system, assigning and tracking tasks like gathering client documents or securing legal approvals can become chaotic.



**Missed Deadlines:** Managing company formations means juggling numerous deadlines and not allowing critical paperwork can easily slip through without a solid task management system. Missing filing deadlines can delay your achievements and frustrate clients relying on timely completion.



**Lack of Progress Visibility:** Without proper task management, getting a clear picture of project progress is tough. Managers struggle to see who's handling tasks and who's working with whom, making it hard to identify bottlenecks or redistribute work effectively.



**Poor Prioritization:** Prioritizing tasks can feel like walking a tightrope. Without a structured system, there's a risk of focusing on less critical tasks while crucial steps, such as obtaining legal approvals or completing client filings, get delayed.



**Client Updates and Follow-Ups:** Keeping clients informed is key to building trust. Without streamlined tracking, staying on top of interactions and updates is challenging. Missing a follow-up call or failing to update clients promptly can lead to misunderstandings and dissatisfaction.

# Studies Suggest:

- The global task management software market is projected to reach USD 4,535.5 million by 2026, growing at a CAGR of 13.3%
- 75% of people experience weekly stress due to increasing task loads and lack of time



## BENEFITS

### 01

#### Timely Execution of Deadlines

With a robust task management system, you can stay on top of critical paperwork deadlines. This ensures that essential documents are filed on time, preventing delays in company formations and maintaining client satisfaction.

### 02

#### Organized Task Assignment

A clear task management system simplifies the assignment and tracking of tasks, such as gathering particular documents and securing legal approvals. This organization reduces chaos and ensures that each task is assigned to the right team member, improving efficiency and reducing errors.

### 03

#### Effective Task Prioritization

Implementing a structured task management system helps prioritize critical tasks accurately. By ensuring that essential steps like obtaining legal approvals and completing client filings are prioritized, you maintain momentum in company formations and deliver results promptly.

### 04

#### Improved Communication

Streamline client updates and follow-ups with integrated tracking systems. A task management system facilitates prompt communication of company progress, ensuring clients are informed at every stage. This transparency builds trust and strengthens client relationships.

# Product Overview

## Sales Management System



A sales management system is a software solution designed to streamline and enhance the sales process within an organization. It provides a centralized platform for managing customer relationships, tracking sales opportunities, and monitoring the performance of sales teams. By automating routine tasks, quotes, payments, generating invoices and reports, and facilitating effective communication, a sales management system helps businesses improve efficiency, increase sales, and build stronger customer relationships. It is an essential tool for optimizing sales operations and driving revenue growth.



# How does it look without a proper Sales Management System?



**Drowning in Manual Data Entry:** Entering client details and pricing manually is time-consuming and error-prone. When a new client needs a quick quote, you have to sift through numerous documents and spreadsheets to find the information.



**Struggling with Inconsistent Quotes:** Manually creating quotes can lead to errors and inconsistencies, affecting professionalism and client trust. Forgetting to include a vital service fee requires corrections, causing confusion and delaying the client's decision.



**Facing Delayed Invoicing:** Manually generating invoices can cause delays, leading to late payments and cash flow issues. After a busy week, you might miss billing details, resulting in late invoices and delayed payments.



**Chasing Payments:** Without online payment options, you spend hours following up on overdue payments, causing frustration and inefficiency while waiting for checks or wire transfers to arrive.



**Lack of Insights and Reporting:** Without a centralized system, tracking sales performance and understanding client behavior is challenging, hindering business growth. Difficulty arises in preparing monthly sales reports due to scattered data across multiple spreadsheets and documents.



## Studies Suggest:

- Sales analytics helps identify areas for improvement, leading to an average 20% increase in sales productivity
- On average, sales teams save 5 hours every week by automating day-to-day tasks using a Sales Management Systems
- Implementing a sales management system has resulted in a 73% boost in business efficiency

# SALES INCREASE

### 01

**Enjoy Streamlined Processes**

Streamline operations by automating quote, invoice, and payment reminder creation. Quickly generate precise client quotes by selecting services from a dropdown menu, letting the system calculate totals automatically, saving you time and reducing errors.

### 02

**Improved Accuracy and Consistency**

Use templates and predefined workflows to ensure every quote and invoice is accurate and consistent. Your client receives a professionally formatted invoice that includes all agreed services and fees, enhancing their trust in your business.

### 03

**Benefit from Faster Invoicing and Payments**

Integrated online payment options allow clients to pay invoices with just a few clicks, speeding up the payment process. Your client receives an invoice via email with a secure payment link, pays immediately, and you get notified of the payment within minutes.

### 04

**Build Better Client Relationships**

Track client interactions and preferences with a CRM, allowing you to provide personalized service and anticipate client needs. You receive a notification that it's time for a follow-up with a client whose company formation process is nearing completion, so you proactively reach out to ensure everything is on track.

### 05

**Gain Data-Driven Insights**

Built-in reporting and analytics give you valuable insights into sales performance and client behaviour, helping you make informed business decisions. You review a monthly sales report that highlights top performing services and identifies trends, enabling you to adjust your strategy and improve performance for the next month.



**Raznameh**  
**GROUP**

# ERP

## Comprehensive Solution



### Product Overview

If you're in need of a comprehensive solution, Raznameh can provide a robust ERP. An Enterprise Resource Planning (ERP) system integrates and manages core business processes such as ATS, CRM, HR, accounting, sales, and inventory, centralizing data to streamline operations and improve decision-making. With real-time visibility, an ERP enhances productivity, reduces costs, and boosts overall performance. Whether on-premises or in the cloud, ERP systems are essential for unifying processes and gaining a competitive edge. A self-hosted ERP offers greater security and full customization to meet your specific business needs.



### Studies Suggest:

- Companies implementing ERP prioritize cost savings (46%), better performance metrics (46%), and more efficient transactions (40%).
- The ERP market is expected to exceed \$49.5 billion by 2025, with strong growth in administrative ERP (7% growth) and human capital management (HCM) (10% growth).

# Get In Touch With Us

You need assistance? For any questions please feel free to contact us at:



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WE ARE HERE TO

# Bring Your Idea To Reality

**Mohsen Niknam**

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**Thank You**  
**For Your Attention**



**Raznameh**  
**GROUP**

More Information: [CLICK HERE](#) 

[www.raznameh.org](http://www.raznameh.org)



# Raznameh Group

Transforming Financial Processes with Digital Solutions



R

Presentation - 2024

[www.raznameh.org](http://www.raznameh.org)





Raznameh  
GROUP



# About Our Company

Headquartered in London, Raznameh is a software development company leveraging optimized infrastructure and automated processes, to deliver high-quality digitalization services for Accounting Firms and Financial Services. Our strategy is not only to study the needs and requirements of you and your clients, but also to ensure that our digitalization solutions are specifically tailored to overcome your day-to-day challenges and enhance your operational capacity significantly. With us, you are not just a client, but a business partner.



# Product Overview

## Sales Management System



A sales management system is a software solution designed to streamline and enhance the sales process within an organization. It provides a centralized platform for managing customer relationships, tracking sales opportunities, and monitoring the performance of sales teams. By automating routine tasks, quotes, payments, generating invoices and reports, and facilitating effective communication, a sales management system helps businesses improve efficiency, increase sales, and build stronger customer relationships. It is an essential tool for optimizing sales operations and driving revenue growth.

# How does it look like without a proper Sales Management System?



**Messy Customer Data:** Without a proper system in place, your customer database resembles a cluttered attic. Spreadsheets make it hard to track who entered what data, leading to duplicate records and lost leads.



**Inefficient Sales Processes:** Manual tracking of sales activities and leads is time-consuming and prone to errors, leading to reduced productivity and missed opportunities.



**Poor Lead Management:** Inconsistent tracking and follow-up on leads can result in missed sales opportunities and a lower conversion rate.



**Lack of Sales Insights:** Without robust reporting and analytics, businesses struggle to gain insights into sales performance, forecast accurately, and make data-driven decisions.



**Decreased Sales Productivity:** Sales representatives spend more time on administrative tasks instead of focusing on selling, leading to lower overall productivity and sales performance.



**Inconsistent Customer Communication:** Difficulty in maintaining consistent and timely communication with customers can harm relationships and reduce customer satisfaction.





# Studies Suggest:

- Sales analytics helps identify areas for improvement, leading to an average 20% increase in sales productivity
- On average, sales teams save 5 hours every week by automating day-to-day tasks using a Sales Management Systems
- Implementing a sales management system has resulted in a 73% boost in business efficiency

## 01

### Improved Organization

Sales management systems serve as databases, effectively organizing lead and customer information. This ensures efficient retrieval and prevents data loss or corruption due to inaccurate storage. Built-in calendar functions and automated alerts help organize staff tasks.

## 02

### Better Scheduling

These systems allow task assignment and deadline establishment, creating a structured work environment. Employees can prioritize tasks, reducing the risk of overlooking important ones. Precise reminders enhance follow-ups, increasing sales opportunities.

## 03

### Enhanced Reporting and Analytics

Sales management systems provide detailed insights into sales performance, customer behavior, and trends. You can generate custom reports, track key metrics, and make data-driven decisions.

## 04

### Streamlined Communication

These systems facilitate communication within your sales team. You can share information, collaborate on deals, and maintain a centralized communication hub.

## 05

### Time-Saving Automation

Quality sales management systems automate follow-ups, reminders, and other essential sales tasks, saving valuable time for your team

# Product Overview

## Self-Hosted CRM SYSTEMS



A CRM (Customer Relationship Management) system centralizes client management by consolidating all client interactions, data, and communications into a single platform. It allows for efficient lead tracking, helping to manage and nurture potential clients throughout the sales pipeline. In today's digital age, it's crucial to be cautious about where you store your data. Avoid sharing sensitive information on shared hosting platforms online, as advanced AI technologies can capture and analyze this data. To ensure the security and privacy of your information, always use secure and trusted solutions.

# CRM



# Without a CRM?



**Messy Customer Data:** Without a CRM, your customer database resembles a cluttered attic. Spreadsheets make it hard to track who entered what data, leading to duplicate records and lost leads.



**Inconsistent Sales Process:** Imagine each salesperson playing their own game. Chaos, right? A CRM brings consistency by providing a standardized customer card and streamlining the sales process.



**Lack of Data Control:** Spreadsheets don't protect your data like a CRM does. Plus, finding crucial information feels like searching for a needle in a haystack.



**Productivity Hurdles:** Manual updates and confusion slow down your team. A CRM boosts productivity by automating routine tasks.



## Studies Suggest:

- 91% of companies with more than 11 employees use a CRM system
- A CRM system can increase conversion rates by 300%
- A CRM system can yield an ROI exceeding 245%
- 50% of teams improved productivity using a mobile CRM

# CRM

## BENEFITS

01

### Enhanced Data Protection

CRM systems come with advanced security measures such as encryption, access controls, and audit logs to safeguard sensitive CRM data against breaches and unauthorized access.

02

### Improved Client Relationships

By having a centralized repository of client information, financial services firms can provide personalized and timely services, enhancing client satisfaction and loyalty.

03

### Streamlined Sales Processes

Automation of sales tasks such as follow-ups, lead scoring, and pipeline management ensures a more efficient and organized sales process, reducing manual effort and increasing conversion rates.

04

### Data-Driven Insights

Provides comprehensive analytics and reporting features, allowing firms to gain valuable insights into client behaviors and sales performance, facilitating informed decision-making.

05

### Scalability

As the firm grows, CRM systems can easily scale to accommodate an increasing number of clients and more complex data management needs.

06

### Secure Document Storage

Offers a secure platform for storing and sharing sensitive financial documents



# Product Overview

## Collaboration Platforms



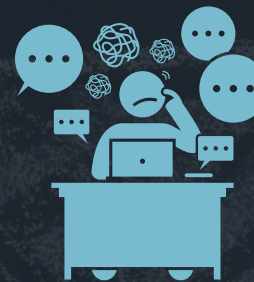
Collaboration platforms facilitate seamless communication and project management within financial services firms. These platforms provide a centralized hub for team members to share documents, collaborate on tasks, and coordinate projects in real-time. They also allow you to manage website channels and collaborate with clients. By breaking down communication barriers and fostering collaboration, these platforms enhance efficiency and productivity across teams.



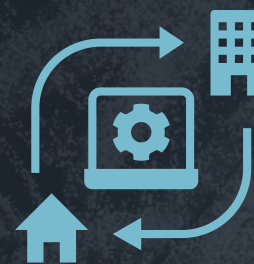
# ... And Without a Reliable Collaboration Platform?



**Communication Breakdowns:** Critical information about market trends, customer preferences, or regulatory changes might not reach the right people promptly, leading to missed opportunities or compliance issues.



**Ineffective Management:** Managers may find it challenging to coordinate efforts, provide guidance, and monitor progress without a centralized platform



**Remote Work Struggles:** The rise of remote work requires robust collaboration tools. Picture an insurance company where claims adjusters work remotely. Without a platform, they struggle to coordinate with underwriters, agents, and legal teams. Delays in claims processing impact customer satisfaction and operational efficiency.



**Inefficient Client Onboarding:** Without a centralized platform, advisors and compliance officers exchange paperwork via email or physical copies. The lack of real-time updates and automated workflows delays the onboarding process, affecting client satisfaction and revenue generation.



# COLLABORATION

## BENEFITS

01

### Improved Team Collaboration

Team members across different branches can collaborate in real-time on client proposals and financial reports using the platform, enhancing teamwork and productivity.

02

### Efficient Project Management

By using the platform to assign tasks and set deadlines, our project managers have reduced project completion times significantly, ensuring timely delivery of services to clients.

03

### Enhanced Document Management

Centralizes document storage and version control, making it easy for team members to access and collaborate on documents securely.

04

### Remote Work Enablement

Facilitates remote work by providing access to documents and communication tools from any location, promoting flexibility and work-life balance.

05

### Client Collaboration

Clients can easily and securely communicate with us through our client portal, fostering transparency and strengthening client relationships.

Studies Suggest:

- Collaboration platforms reduce the cost per customer by 15% or more

- Implementing collaboration software cut the time to onboard new clients by 20%

# Product Overview

## Self-Hosted E-mail Marketing Services



Email marketing automation is a time-saving strategy that uses specialized software to send personalized emails to a target audience based on predefined triggers or schedules. It streamlines communication, nurtures leads, provides a personal touch, enhances customer engagement. A Self-hosted email marketing service also provides better security compared to third-party services.

By leveraging email marketing automation this service you can introduce new subscribers to your company using automation software with a welcome series, or re-engage lapsed customers. You can also reach the right people with the right content at exactly the right time. This will surely free you up to focus on other aspects of your business.

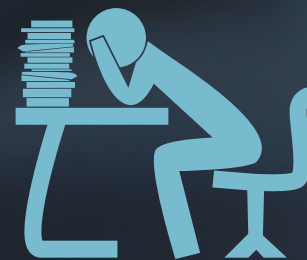
# What About No E-mail Marketing System?



**Resource Intensive:** Without automation, you may need more staff to handle email marketing tasks, increasing operational costs and reducing the overall efficiency of your marketing efforts.



**Increased Risk of Errors:** Manual processes increase the risk of errors, such as sending emails to the wrong segments or failing to update subscriber lists accurately.



**Ongoing List Management and Content Creation:** Managing your email list requires effort. Regularly clean inactive subscribers and update contact details. Creating compelling content consistently is another challenge. An efficient email marketing system helps you automate list management and plan your content in advance.

EMAIL  
MARKETING

## Studies Suggest:

- For every \$1 spent on email marketing, the average ROI is \$44
- Email marketing produces 174% more conversions than social media
- From 2022 to 2025, the number of email users is projected to reach from 4.3 to 4.6 billion!

# BENEFITS

01

## Personalized Email Campaigns

Tailor emails based on client preferences and behaviors to keep them engaged with personalized content that meets their specific needs.

02

## Targeted Drip Campaigns

Use automated drip campaigns to nurture potential clients over time, providing them with relevant information and guiding them through your sales funnel.

03

## Automated Compliance Updates

Ensure you adhere to industry regulations by automating the communication of compliance-related updates and reminders to your clients.

04

## Performance Tracking and Improvement

Leverage analytics to track metrics such as open rates, click-through rates, and conversions, allowing you to optimize your email campaigns for better results.

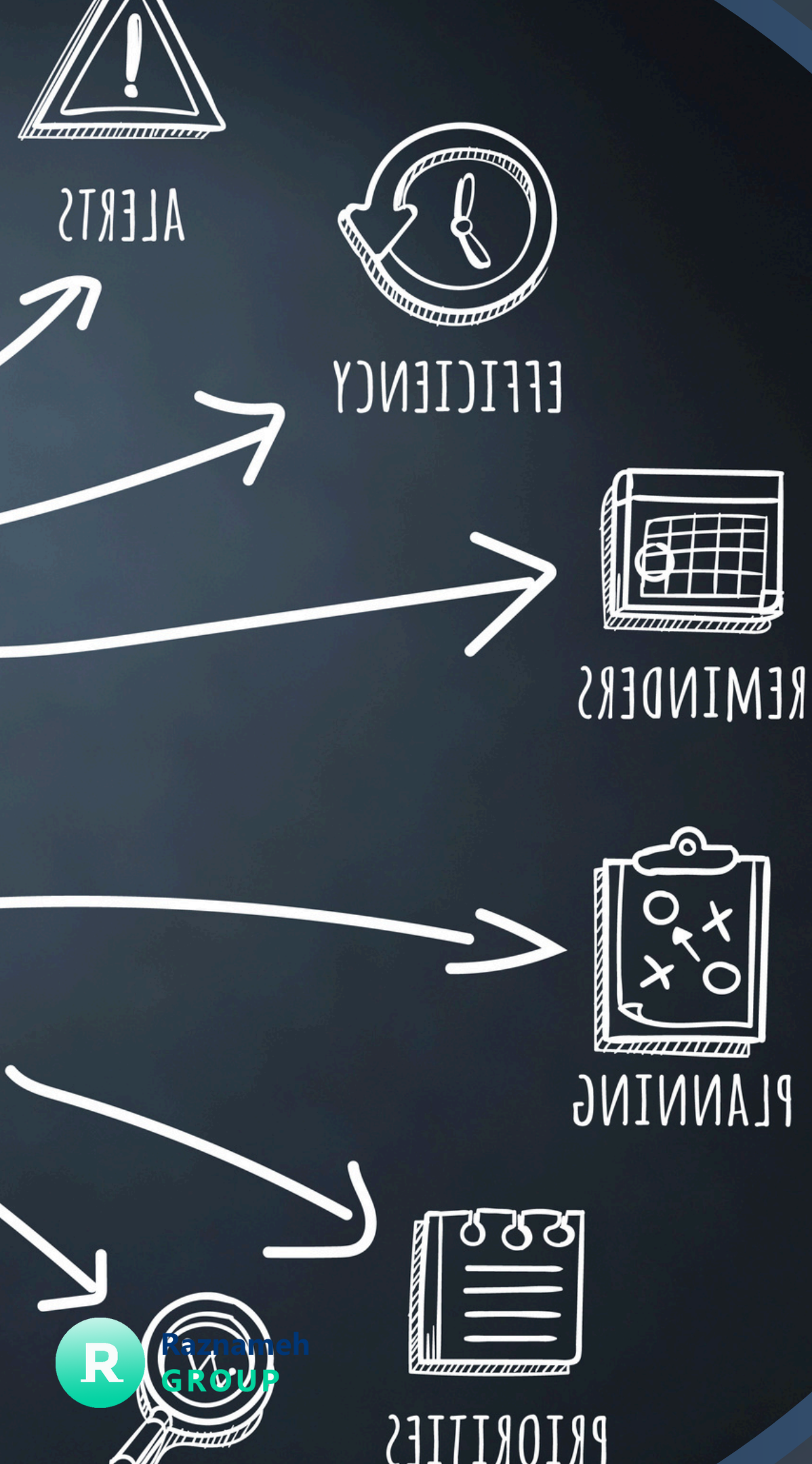


# Product Overview

## Task Management Platforms



Task management platforms are essential tools for modern financial services and accounting firms, designed to streamline the process of assigning, tracking, and managing tasks. These platforms enhance productivity by providing a clear framework for task delegation, deadline management, and team collaboration, ensuring that every task is completed efficiently and on time.



# ...Without a Task Management Platform?

N O W



L A T E R



**Disorganized Workflows:** Without a task management system, processes become chaotic. Employees struggle to track tasks, deadlines, and dependencies. By implementing a robust task management tool, you can streamline workflows and ensure efficient collaboration.



**Missed Deadlines and Delays:** Tasks slip through the cracks, leading to missed deadlines. This affects project timelines, client satisfaction, and overall productivity. A task management system provides reminders, notifications, and clear timelines.



**Reduced Productivity:** Manual tracking consumes time and effort. Employees spend more time managing tasks than actually working on them. Automated task management boosts productivity of your employees by streamlining processes.



**Data Security Risks:** Handling sensitive data without a secure system poses risks. An encrypted task management tool protects your confidential information.



## Studies Suggest:

- Task management platform reduces manual project report collation time by 50%.

- 77% of high-performing projects utilize project management software

- Task management system provides real-time visibility into project progress by 55%

## BENEFITS

01

### Automated Task Assignment

You will be able to automatically assign tasks based on team member availability and skillset, reducing downtime and ensuring optimal use of resources.

02

### Transparent Responsibility Tracking

Clearly delineate and coordinate responsibilities within your team, so everyone knows their role and what is expected of them, reducing confusion and overlapping efforts.

03

### Automated Reminders and Alerts

Set automated reminders and alerts for upcoming deadlines to ensure that critical tasks are completed on time, minimizing the risk of missed deadlines.

04

### Centralized Communication

Use a central platform where team members can communicate, share files, and update task statuses, promoting a cohesive and collaborative work environment.

05

### Efficient Task and Project Monitoring

Utilize real-time dashboards to monitor the progress of tasks and projects, allowing you to make timely decisions and adjustments as needed.



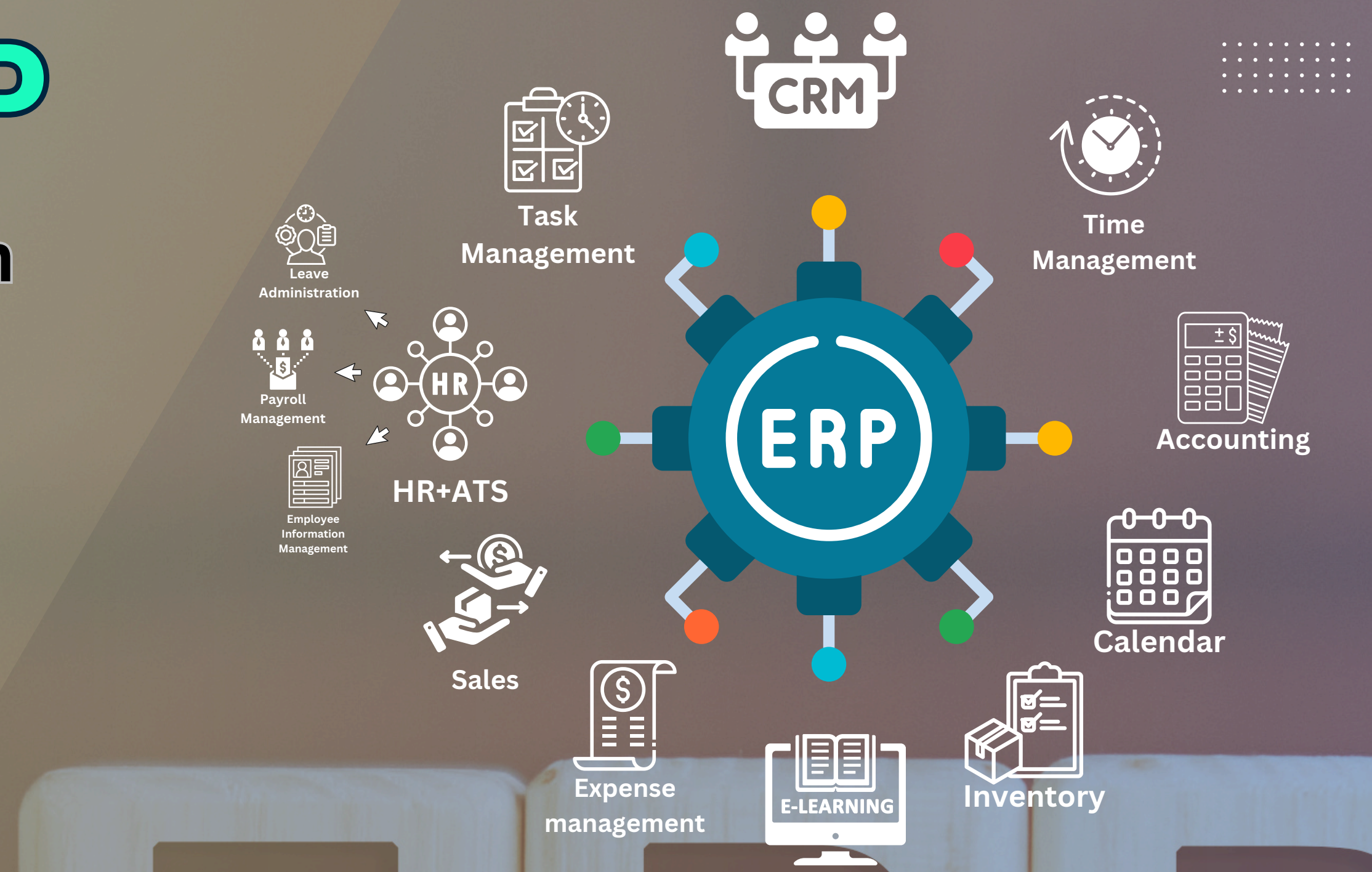
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