



**TASKFLOW**

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COMPANY PROFILE

Every business wants to maximize sales and customer satisfaction levels.

We believe that by developing, integrating and applying smart technology in the right way, customer interactions can be made easy and engaging.

TaskFlow was established in 2015 to offer contact centers powerful cloud hosted sales and CRM solutions with a clean, simple interface and tightly integrated unified communications.

## COMPANY INFO AND CONTACT DETAILS

- **Business Name:** Taskflow Pty (Ltd)
- **Registration Number:** 2015/382253/07
- **VAT Number:** 4140271596
- **Business Address:** 180 Garsfontein Road, Ashlea Gardens, Pretoria, 0081
- **Phone:** +27 12 111 0998

## ABOUT TASKFLOW

### Purpose

To be a leader in the CRM software industry by providing enhanced services, relationship and profitability

### Vision

To provide quality products and services with exciting user experiences that exceed the expectations of our customers.

### Mission Statement

To build long term relationships with clients and provide exceptional customer service by pursuing business through innovation and advanced technology.

# DIRECTORS

## **Charl Naude** *(Managing Director)*

Charl Naude Graduated from University of Pretoria in B. Com Informatics thereafter he gained corporate experience at various companies. He joined BBD in 2011 as a Business analyst consulting the SARS modernisation department. He then moved to Entelect in 2013 and consulted as a Business Intelligent analyst and Business Systems Analyst for companies like: Rand Merchant Bank, Auto and General and Liberty Finance. In October 2015 Charl became a co-founder of TaskFlow and currently holds the position of MD.

Charl believes in giving nothing less than excellent customer service based on trust relationships, which are supported by a solid and innovative product stack.

## **Andre De Kock** *(Technical Director)*

Andre has a BSc (Hons) Computer Science degree from the University of Pretoria. Even while studying, Andre started developing software for companies such as EPI-USE. Andre started his full time career in 2012 as a software developer when he joined a startup company where he eventually became Technical Director. Being extremely driven, Andre moved on to become co-founder of TaskFlow where he is currently the Technical Director.

Andre's main driver is his passion for programming. His core focus is innovation and releasing quality products to the market.

## **Christian Frische** *(Financial Director)*

Christian Frische graduated from the University of Pretoria in 2003 in Multimedia (BIS). Following that he focussed on expanding his business, Spiraleye Studios, a software development company, which he had started in 2002. He went on to found further IT companies including Fox5 Internet Solutions (IT Networking and VOIP solutions), goNXTmove (Business Design Audit software), Swordfish Software (Revenue Management and Collection software), Revolution CRM (Real Estate CRM) and TaskFlow.

Christian is passionate about leadership and creating driven and highly effective teams. His core focus areas include strategy, business development and workforce optimisation.



## **Juan Maree** *(Operations Director)*

Juan Maree graduated from University in B.Sc. Computer Science. During his studies he started working in software development companies as a freelance developer. On obtaining his degree he went on to work full time as a software developer at various companies, refining his craft, to eventually become a co-founder of TaskFlow.

Juan is driven by innovation and optimization of processes to enable continues delivery of excellence

# MARKET

## Target Market

- Contact Centers (Sales, support, customer satisfaction, maintenance...)
- Medium to large Sales Teams
- Customer Support (in-house or contracted)
- Microlenders
- Business Process Outsourcing

## Competitors

### CRM/Contact Centre Solutions

1. Salesforce
2. Microsoft Dynamics
3. Oracle Siebel
4. SAP CRM & Contact Center
5. Pegasystems
6. Presence
7. Interactive Intelligence

### Helpdesk

1. Freshdesk
2. Zendesk

### Loan Management System

1. Delphin/Webfin
2. Proloan
3. Delter IT

# PRODUCTS

## Technology and Underlying Framework

TaskFlow makes use of a dynamic web and mobile friendly framework that allows for the rapid development of new products and modules that are all seamlessly integrated with other existing TaskFlow products. The underlying framework itself is built using global best practice technology and methodologies and are continuously being enhanced and extended.

## TASKFLOW PRODUCTS/MODULES

### Campaign manager

- Comprehensive reporting and statistics suites
- Dynamic Campaign management
- Connected to all TaskFlow modules; enables you to build campaigns from any data
- Call, Email and SMS campaign management
- Smart SMS management

### Call Centre

- Manage call center agents
- Create new dispositions (call outcomes) on the fly
- Manage automated actions from call outcomes (e.g. send welcome email after sale has been made)
- Real-time reporting on agent activity and performance

### CRM

- Accurate forecasts; using actionable data to make better decisions
- Automate activities based on your sales scripts: calls, meetings, mailing and quotations. Get all information you need, directly on the opportunity: page viewed, mail received, etc
- Know exactly how you perform compared to your monthly targets. Organize your work based on your scheduled next actions
- Get a quick overview of what's going on in your team. See when a colleague logs a call or send a quote. Share ideas and files in real-time and catch-up on activities you missed while you were away

## Project Management

- A simple drag-and-drop view to help you easily group tasks at the right stage
- Easily check your team's planning and reschedule to keep within your deadlines
- Keep track of deadlines and progress of your projects with a clear overview
- Keep a good overview of your workload and of the status of individual tasks
- Add quick notes or attach files to any task and stay connected to your team. Forget endless follow-up meetings to keep track of projects. Communicate through the chatter, write in a shared real-time pad, or use live chat - all within a single interface

## HelpDesk

- Create tickets automatically from emails
- Keep your clients updated by rules set up to notify changes made to helpdesk issues
- Give your clients portal access to view real time updates
- Decide to assign tickets automatically or pull based

## Loan Management System

- Management of loans, payments and disbursements
- Integration into banks for payment and disbursement automation
- Full loan application process that follows NCR regulatory guidelines
- Integration into credit bureau for pre-vetting, credit checks, data washing and bank account verification
- Teller and cashbox management, including daily cashbox counting and manager override in case of discrepancies
- Accounting functionality, e.g. drawing up chart of account statements
- Full API, allowing third party integration into LMS
- Reporting in the form of pivot tables and graph views that are customisable per manager

## Webchat

- Integrate into any website
- Chat online with customers and website visitors in real time
- No need for a special chat server, everything is done through your website
- Create channels to filter your audience by country and provide better customer service by engaging with your customers and website visitors using the right language and tone
- Keep conversation with your customers from within TaskFlow to allow multitasking when looking for important information from the backend of your environment. Access all information at the same time as the conversation window is open so you can give accurate and precise answers
- Gather customer feedback to improve the quality of your service with a very simple rating tool for live chat sessions. Customers simply have to rate the conversation after their questions have been answered
- Allow to spend less time on more frequent questions by inserting pre-written answers using simple keyboard shortcuts. Customize answers at wish and add as many shortcuts as you like

# KEY DIFFERENTIATORS & ADVANTAGES

- Developed in South Africa (Not dollar based; not exchange rate dependant pricing)
- OPEX (in addition to CAPEX model). Module and user number based pricing allows for flexible up and downscaling of total monthly user fees.
- Month-to-month contracts available to avoid long term contracts that lock customers in. This reduces the risk and hurdle to sign up with TaskFlow.
- Short turn-around time. Easy and fast setup & configuration.
- Full redundancy. Multiple server clusters and networks provide active call and data failover.
- Highly skilled and experienced staff.
- Hands-on assistance with workflow and business process optimisations and requirements analysis to maximize productivity and efficiency using TaskFlow as process enabler.
- Emphasis on customer service above all else.
- Rapid deployment of new solutions and instances.
- Full-featured, scalable and reliable products and services.
- Industry leading reporting software. Highly flexible and extensive reporting gives customers the ability to generate virtually any type of report on any data in the system.
- Custom developments, integrations, solutions and support offered by our in-house agile development team. Should any custom needs exist, TaskFlow will be able to adapt the product to suit the unique requirements.
- Flexible hosting: Cloud-hosted and/or on-site hosted options available.
- TaskFlow is the only locally developed product to offer such a wide technology stack range.



# INTEGRATIONS

TaskFlow is committed to integrating with as many service providers as possible to enhance the product's abilities, extend the partner and reseller network and ultimately improve the whole user experience of using and engaging with TaskFlow as a product and business. Our existing integrations consist of:

## **Voice**

- Teleforge
- Fox5

## **Credit Bureaux**

- XDS
- Compuscan

## **Debit Order Processing**

- Paym8
- Intecon

## **Debt Collection**

- Swordfish

## **SMS**

- Panacea

## **AVS**

- XDS

## **EFT Credits**

- Intecon
- Paym8

## **Real time Card Payments**

- Payfast