

A TELCOWIN GUIDE · FROM SPREADSHEETS TO CRM

# The RM180,000 row

One week inside a growing sales team, and the proposal a spreadsheet almost lost.



|   | Company                     | Contact        | Owner | Value (RM)     | Status    | Last update |
|---|-----------------------------|----------------|-------|----------------|-----------|-------------|
| 1 | Seri Gemilang Holdings      | Rizal Hakim    | Aina  | 56,000         | Contacted | 28/03       |
| 2 | <b>Awan Mendung Sdn Bhd</b> | Amirul Hakim   | Farid | <b>180,000</b> | Proposal  | 12/03       |
| 3 | Rimba Niaga                 | Siti Nurhaliza | Kumar | 120,000        | Qualified | 02/04       |

**Revised proposal to Awan Mendung. Due FRIDAY. (nobody else knows)**

# One deal. One week. Nine chapters.

Diana Rashid runs sales at Langit Biru Solutions, a 25-person business in Kuala Lumpur. This is the week her biggest deal nearly disappeared without anyone deciding to lose it.

|                  |                                                                                   |    |
|------------------|-----------------------------------------------------------------------------------|----|
| <b>START</b>     | <b>Score yourself</b><br>Ten questions. Keep the number.                          | 03 |
| <b>MON 9:10</b>  | <b>1 • The row that said everything was fine</b>                                  | 04 |
| <b>MON 11:30</b> | <b>2 • Where the lead actually lives</b>                                          | 05 |
| <b>TUE 9:00</b>  | <b>3 • The pipeline meeting</b>                                                   | 06 |
| <b>TUE 3:00</b>  | <b>4 • What a missed follow-up costs</b><br>With a worksheet for your own numbers | 07 |
| <b>WED 10:15</b> | <b>5 • The call sales didn't know about</b>                                       | 08 |
| <b>THU</b>       | <b>6 • The same week, replayed</b>                                                | 09 |
| <b>THU 4:00</b>  | <b>7 • Automation keeps Farid on the phone</b>                                    | 11 |
| <b>FRI</b>       | <b>8 • Moving without bringing the mess</b>                                       | 12 |
| <b>NEXT MON</b>  | <b>9 • How it ended</b>                                                           | 13 |
| <b>AFTER</b>     | <b>Where Telcowin fits • Your score, again</b>                                    | 14 |

Langit Biru Solutions, Awan Mendung Sdn Bhd and every person in this story are fictional. All figures and screens are illustrative.

# Score yourself first

One point for every "yes." Write the number in the box. We'll come back to it on the last page.

**01** Customer information lives in more than one spreadsheet.

☐

**02** Reps keep their own notes or lists.

☐

**03** You can't see the pipeline without asking someone.

☐

**04** A follow-up has slipped in the last month that you know of.

☐

**05** Two reps would define "Qualified" differently.

☐

**06** Finding a customer's full history means asking around.

☐

**07** Someone builds the weekly report by hand.

☐

**08** A customer has been called by two of your people about the same thing.

☐

**09** You've hired, opened a location or added a channel this year.

☐

**10** Your best rep's pipeline would be hard to pick up if they left tomorrow.

☐

## 0 to 3

The spreadsheet still works. Tidy what gets recorded and look again in six months.

## 4 to 7

You're outgrowing it. This week has probably already happened to you.

## 8 to 10

The spreadsheet has become the process, and it's costing you deals you can't see.

YOUR SCORE

**Most growing sales teams score 5 or higher. Here's what a 7 looks like from the inside.**

# The row that said everything was fine

Diana Rashid runs sales at Langit Biru Solutions. Twenty-five people, three years of steady growth, one shared spreadsheet called *Sales\_Leads\_FINAL.xlsx*.

Row 2 is the biggest deal of her quarter. Awan Mendung Sdn Bhd. RM180,000. Status: *Proposal*. It looks fine. That's the problem.



|   | Company                | Owner | Value (RM) | Status    | Next step | Last update |
|---|------------------------|-------|------------|-----------|-----------|-------------|
| 1 | Seri Gemilang Holdings | Aina  | 56,000     | Contacted | Call back | 28/03       |
| 2 | Awan Mendung Sdn Bhd   | Farid | 180,000    | Proposal  | (blank)   | 12/03       |
| 3 | Rimba Niaga            | Kumar | 120,000    | Qualified | Send deck | 02/04       |
| 4 | Kota Digital           | Aina  | 45,000     | New       |           | 04/04       |

**ILLUSTRATIVE** The only record of the deadline is on Farid's desk.

## What the row doesn't say

The customer asked for a revised proposal three weeks ago. The revision was due last Friday. Farid, the rep, wrote the deadline on a Post-it and then spent the week on a tender. Nobody else knew there was a deadline.

The spreadsheet isn't wrong. It's just the last thing someone typed.

### SIGNS YOU'RE HERE

- The status is accurate as of whenever someone last remembered it.
- "What's the next step?" gets answered from memory.
- Deadlines live somewhere other than the customer record.

**A spreadsheet records what happened. It has no way of telling you what didn't.**

# Where the lead actually lives

Diana starts piecing Awan Mendung back together. It takes her most of the morning.



Nothing is missing, exactly. It just isn't anywhere the business can see it.

**Your team isn't losing information. It's storing it in six places and trusting that one person remembers where.**

# The pipeline meeting

Tuesday is pipeline review. Diana asks each rep to walk through their deals.

Farid says Awan Mendung is "Qualified, looking strong." Another rep marks a deal "Qualified" after the first friendly call. A third waits for a confirmed budget. Same word, three meanings. Add them up and you get a forecast built on optimism.

Nobody is lying. The spreadsheet just lets every rep run their own definition. So the meeting becomes a status update read aloud.

# 90

MINUTES

on *what's happening*.  
Almost none on *what happens next*.

## "QUALIFIED" AT LANGIT BIRU, BY REP

### Farid

They seemed keen on the call.

### Aina

They replied to my email.

### Kumar

Budget confirmed in writing.

## Six stages that mean the same thing to everyone

| STAGE           | MEANS                  | MOVES ON WHEN                     |
|-----------------|------------------------|-----------------------------------|
| 1 • New lead    | We know they exist     | A rep has made contact            |
| 2 • Contacted   | We've spoken           | Need and decision-maker confirmed |
| 3 • Qualified   | Real need, real budget | Proposal requested                |
| 4 • Proposed    | Proposal is with them  | They respond with terms           |
| 5 • Negotiation | Terms on the table     | Signed, or lost                   |
| 6 • Won or lost | Closed                 | Reason recorded, either way       |

The "moves on when" column is the one that matters. Write it down, and it stops depending on who's filling in the sheet.

# What a missed follow-up costs

A missed follow-up never makes noise. The customer just goes quiet, and three weeks later someone marks the deal "Lost: no response."

Do the maths once. It changes how the Tuesday meeting feels.

## YOUR FOLLOW-UP LEAK · WORKSHEET

|                                           | EXAMPLE  | YOURS                |
|-------------------------------------------|----------|----------------------|
| New leads a month                         | 40       | <input type="text"/> |
| × Share that never get a timely follow-up | 10%      | <input type="text"/> |
| × Your normal win rate                    | 25%      | <input type="text"/> |
| × Average deal size                       | RM60,000 | <input type="text"/> |
| <hr/>                                     |          |                      |
| = Revenue leaking each month              | RM60,000 | <input type="text"/> |

# RM720K

A YEAR, IN THE EXAMPLE

From deals nobody decided to lose. No one argued for dropping them. They just ran out of reminders.

That's the quiet cost. The louder one is Awan Mendung, which is one missed Friday away from joining it.

ILLUSTRATIVE Example figures only. Use your own.

# The call sales didn't know about

Amirul Hakim, Operations Director at Awan Mendung, calls Langit Biru. Not about the proposal. About a login issue on the system they bought last year, open for eleven days.

The service team knows about the ticket. Sales doesn't. So when Farid finally calls Amirul that afternoon to apologise for the late proposal, he walks straight into it. From Amirul's side, this is one company. It just doesn't look that way from the inside.

**CRM** Accounts > Awan Mendung Sdn Bhd

**AM**

**Awan Mendung Sdn Bhd**  
Business services · Kuala Lumpur · Customer since Jan 2025 · Owner: Farid Amir

**KEY CONTACTS**  
**Amirul Hakim**  
Operations Director · decision-maker  
**Mei Lin Wong**  
Head of Customer Experience

**OPPORTUNITIES**  
**Digital engagement** **Proposed**  
RM180,000  
**Revised proposal · 4 days overdue**

**SERVICE CASES**  
**Login access issue** **Open**  
CAS-004321 · 11 days open  
**Onboarding query**  
Resolved · Feb 2026

**RECENT ACTIVITY**  
**Call logged** · Wed 10:15  
Amirul chasing login issue (Service)  
**Email** · 18 Mar  
Revised requirements received  
**Meeting** · 12 Mar  
Proposal walkthrough with Amirul

**ILLUSTRATIVE** Sales, service and history on one record. Farid would have seen the case before he dialled.

Customers experience one company. A spreadsheet shows them as three rows in three files.

# The same week, replayed

Run Diana's week again, this time with one shared customer record.

|            | WITH THE SPREADSHEET                                         | WITH ONE SHARED RECORD                                                                                                  |
|------------|--------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------|
| <b>MON</b> | Diana finds the overdue revision by chance, three days late. | The deadline was logged on the deal. It turned amber on Thursday and red on Friday. Diana asks <b>before</b> it passes. |
| <b>TUE</b> | 90 minutes of reps reading out statuses.                     | Opens on the live dashboard. Goes straight to the five deals with overdue actions. <b>40 minutes.</b>                   |
| <b>WED</b> | Farid is blindsided by an 11-day-old service case.           | Farid sees the case on the account and <b>opens with it.</b> The call goes from awkward to useful.                      |

## 3 days

EARLIER

The missed deadline is caught before it's missed.

## 90 → 40

MINUTES

The pipeline meeting, spent on next steps.

## 0

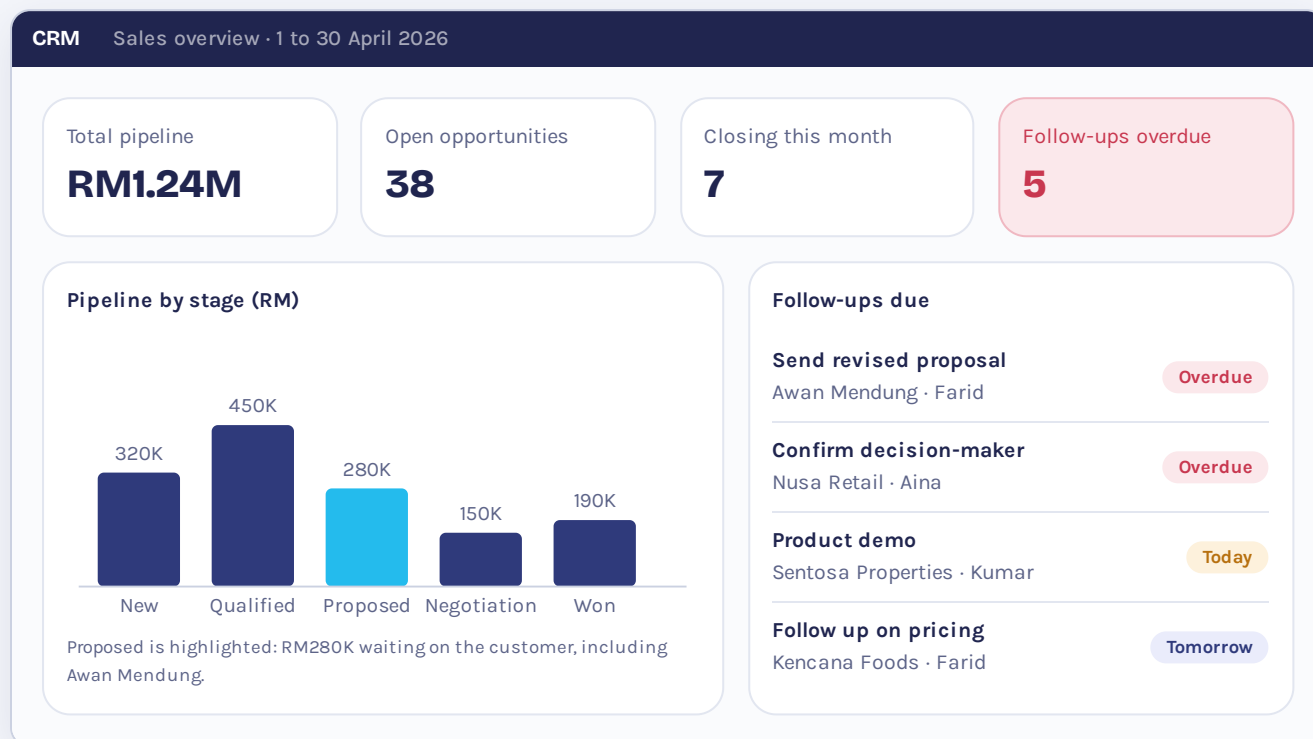
SURPRISES

Farid knows about the open case before he dials.

Nothing in that week needed new people or harder work. It needed the information in one place, and something that notices when a date goes past.

The dashboard is the visible part. What actually changes is that everyone works from the same version of the customer.

# What Diana sees on Tuesday morning



ILLUSTRATIVE Pipeline, overdue actions and owners, in one view.

## Every number on the screen should point to an action

### Overdue: 5

Open the list and call them today.

### Closing: 7

Check each one has a next step with a date.

### By stage

See where deals stall, and ask why.

If a number doesn't tell someone what to do next, take it off the screen.

# Automation keeps Farid on the phone

Farid's week has about eight hours of admin in it. Copying leads between sheets. Setting reminders. Writing up calls. Building the Friday report.

Automation takes the admin away. It doesn't take away the conversations.

## 8 hrs

OF ADMIN A WEEK

A full selling day, spent typing.

| THE SYSTEM HANDLES                                | FARID KEEPS                        |
|---------------------------------------------------|------------------------------------|
| Assigning new web leads to the right rep          | The first call                     |
| Reminding him <i>before</i> a deadline, not after | Deciding what the revision needs   |
| Logging emails against the account                | Reading Amirul's mood on the phone |
| Building the pipeline report                      | Explaining why a deal slipped      |



### Due tomorrow: revised proposal

Awan Mendung Sdn Bhd • RM180,000 • Owner: Farid Amir

Open deal

1 open case

One reminder, on Thursday, with the open service case attached. That's the whole difference between this story and a lost deal.

ILLUSTRATIVE

The point isn't fewer conversations. It's the right conversation at the right time, with the history already on screen.

# Moving without bringing the mess

Diana is convinced. Her first instinct is to import *Sales\_Leads\_FINAL.xlsx* into a CRM and be done by lunch.

That's how you get the same mess with a nicer interface. Three years of spreadsheets means duplicate companies, contacts who left in 2024, and five versions of "Qualified."

## Answer these before you move anything

**1** Which list is the one we trust?

**2** Which companies appear more than once, under different spellings?

**3** Which contacts haven't responded in over a year?

**4** What does every record need, as a minimum?

**5** Which six stages are we using, and what moves a deal between them?

**6** What gets archived instead of migrated?

### AND ONE RULE FOR GETTING THE TEAM TO USE IT

Reps adopt a CRM when it helps *them*: fewer reminders to keep, less history to chase. They drop it when it feels like reporting for management.

**The first week the manager asks for "a quick spreadsheet summary," the team learns the CRM is optional. Run the Tuesday meeting from the CRM, and it becomes how the business works.**

## How it ended

Farid sent the revised proposal on Wednesday night, with an apology and a fix date for the login issue. Awan Mendung signed three weeks later.

Diana kept the deal. What stayed with her was the feeling of finding it by luck. She'd opened the spreadsheet on a Monday for another reason and happened to ask.

**The spreadsheet wasn't the wrong place to start. It got Langit Biru to 25 people.**

**It was just never built to tell Diana what hadn't happened.**

# From six places to one working record

We help growing businesses move from scattered customer information to one working CRM, set up around how your team actually sells.

## Readiness assessment

Where your information lives today, and where it leaks.

## Data preparation and migration

Your trusted list moved over. The duplicates left behind.

## CRM implementation

Stages, fields and views that match how your team really sells.

## Dashboards

Built around the actions each role needs to take.

## Follow-up automation

Assignment, reminders and logging, so reps stay on the phone.

## Training and adoption

We stay past go-live, until the Tuesday meeting runs from it.

## How the work runs

### Advise

Work out what's actually broken, and what to build first.

### Build

Set up, migrate and connect, around how you sell.

### Grow

Stay after go-live, until people use it on a Tuesday.

Telcwin is a Salesforce Summit Partner.

YOUR SCORE, AGAIN

# Look at the number you wrote on page 3.

4+

Bring us the spreadsheet your team uses today.

In 45 minutes we'll walk through how one lead comes in, gets assigned and gets followed up, and show you where it leaks. You leave with a one-page map of your pipeline, whether or not you work with us.

**Book a 45-minute pipeline walkthrough**

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