
CASE STUDY

PROXA WATER SERVICES

Johannesburg, South Africa

OUTLINE OF TOPICS

WHAT WE'LL DISCUSS

About Company
Project Overview
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ABOUT PROXA

ADVANCED WATER SOLUTIONS FOR A SUSTAINABLE FUTURE

Proxa is a specialised provider of advanced water and wastewater treatment solutions serving the mining, industrial, food & beverage, and municipal sectors. PROXA delivers end-to-end water lifecycle management—ranging from raw water treatment and process water optimisation to wastewater recycling and reuse. With a strong focus on sustainability, compliance, and operational efficiency, Proxa Waters combines innovative technology with deep industry expertise to help clients reduce environmental impact while improving reliability and cost effectiveness.

PROJECT OVERVIEW

Proxa Waters required a centralised CRM solution to streamline sales operations, manage complex client engagements, and improve visibility across inquiries, leads, and tender-driven opportunities. We partnered with Proxa Waters to design and implement a custom CRM platform aligned with their business workflows across mining, industrial, food & beverage, and municipal projects.

The CRM was designed to:

- Capture and manage all inquiries and leads in a single system
- Convert potential leads into structured opportunities
- Support evaluation of opportunities and manage the complete tendering lifecycle
- Provide real-time visibility through dashboards and reports
- Integrate seamlessly with existing tools such as MS Outlook for notifications and scheduling

The solution focuses on clarity, automation, and decision support, enabling sales and management teams to act faster and more effectively.

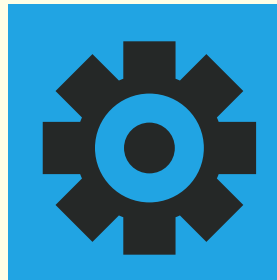
PAIN POINTS FOR PROXA WATERS



Fragmented tracking of inquiries and leads across emails and spreadsheets



Lack of structured process to convert leads into qualified opportunities



Difficulty managing long and complex tendering cycles



Limited visibility into daily sales activities and follow-ups

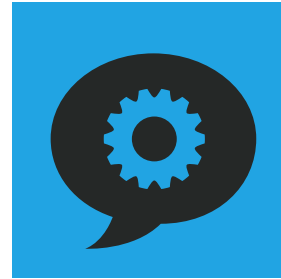


No automated currency converter and reminders or notifications tied to calendars and email

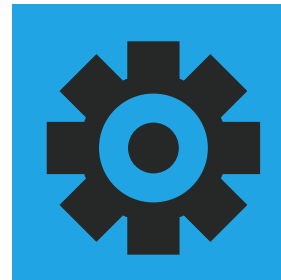
OUR SOLUTIONS FOR PROXA WATERS



LEAD & INQUIRY MANAGEMENT - Centralized inquiry capture, lead tracking, qualification, conversion, and complete client interaction history.



OPPORTUNITY & TENDER MANAGEMENT - Structured opportunity pipeline with configurable stages, evaluations, tendering, doc tracking



DASHBOARDS & REPORTING - Quick dashboards provide real-time KPIs, sales insights, and actionable updates for teams.



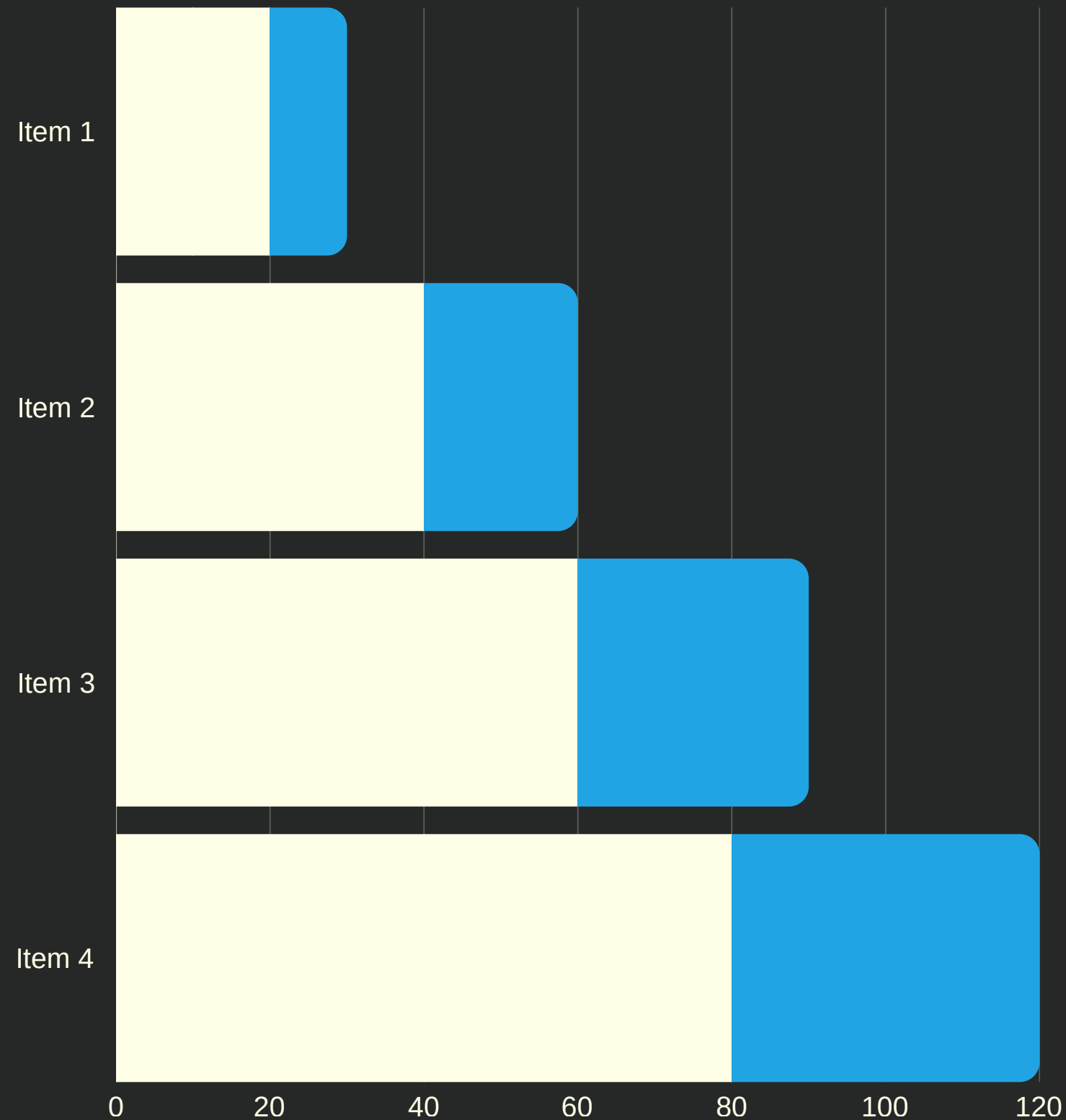
EMAIL & CALENDAR INTEGRATION - Outlook integration with alerts and calendar reminders improves coordination, preventing missed actions.



CURRENCY CONVERSION INTEGRATION - Currency converter helps the Proxa team to calculate the bidding details with real-time currency management.

FACTS & FIGURES

- Streamlined Lead Management improved conversion efficiency by **45%**.
- Real-Time Dashboards and Smart Reports enhanced management visibility by **50%**.
- Email Alerts and Workflow Automation reduced follow-up delays by **55%**.



**CENTRALIZED CRM
PLATFORM
REDUCED MANUAL
TRACKING AND
MONITORING
TIME.**

**OPTIMIZED
REPORTING
STRUCTURE
IMPROVED SALES
FORECASTING
ACCURACY.**

PROXA WATERS TIMELINE

A 6-MONTH JOURNEY



My Desk

Infrastructure

HRMS

Workforce

Finance

HR Old

Operations

Subscription

Inventory

New Inventory

CRM

Projects

PROXA EUROPE

Lead

CRM • Lead

Search...

Filter

Sort

Grid

Print

Refresh

Share

ADD

CRM

Dashboard

Notifications

Followups

Tasks

Inquiry

Lead

Opportunity

Approvals

Reports

Company List

Setting

	LEAD NAME	COMPANY DETAILS	PROXA COMPANY	CONTACT DETAILS	INDUSTRY DETAILS	ESTIMATED BUDGET	PROJECT DETAILS	APPLICATION	EST. SUB/CLOSE DATE	ACTION
<input type="checkbox"/>	<div>J</div> Jaledi Yokoena EN-25-AU-87654	Eskom Holdings Existing	South Africa	+27 11 123 45677 eskom@client.co.za	Mining Cobalt	\$5,000,000	Brown DB	Process	05 July 2025	<div>↔</div> <div>📊</div> <div>👁</div> <div>✍</div> <div>🗑</div>
<input type="checkbox"/>	<div>K</div> Kabelo Dlamini EN-25-AU-87655	Transnet Freight New	Europe	+27 21 555 7890 tenders@transnet.za	Industrial Oil & gas upstream	\$3,800,000	Green Rental	Potable	08 July 2025	<div>↔</div> <div>👁</div> <div>✍</div> <div>🗑</div>
<input type="checkbox"/>	<div>S</div> Sipho Nkosi EN-25-AU-87656	City of Cape Town Existing	Middle East	+27 31 987 6543 info@capetown.gov	FMCG & Pharma Detergents	\$2,200,000	Green O	Reuse	10 July 2025	<div>↔</div> <div>👁</div> <div>✍</div> <div>🗑</div>
<input type="checkbox"/>	<div>T</div> Thandi Mahlangu EN-25-AU-87657	Sasol Limited New	Australia	+27 41 321 0987 contact@sasol.com	Minerals & energy metals processing Energy metals refining	\$7,500,000	Brown DBO	Effluent	12 July 2025	<div>↔</div> <div>👁</div> <div>✍</div> <div>🗑</div>
<input type="checkbox"/>	<div>A</div> Ayanda Sithole EN-25-AU-87658	SANRAL Existing	South Africa	+27 13 543 2121 tender@sanral.co.za	FMCG & Pharma Cereal & grains	\$6,000,000	Brown OM	Utilities	15 July 2025	<div>↔</div> <div>👁</div> <div>✍</div> <div>🗑</div>

My Desk

Infrastructure

HRMS

Workforce

Finance

HR Old

Operations

Subscription

Inventory

New Inventory

CRM

Projects

proxa

PROXA EUROPE

Naledi Mokoena

CRM

Dashboard

Notifications

Followups

Tasks

Inquiry

Lead

Opportunity

Approvals

Reports

Company List

Setting

Opportunity Form

CRM • Opportunity • Opportunity Form

* Fields marked with an asterisk (*) are mandatory.

Probability

%Go *
25%
X v

%Get *
25%
X v

%Adjust *
50%
X v

%Probability
80

%Margin *
20

%EBITDA *
5

Conclusion

Bid Status *
Awarded
X v

Won Reason *
Won Reason 1
v

Project Ref No.
P-25-12543

Final Project Value

USD v

260007800

Total Project Cost Value

Project Cost Value

USD

19200

Technology

USD

10000

P&G

USD


Enter P&G

Site Works




USD


Enter Site Works

Solution Look Over




PROXA EUROPE



Naledi Mokoena

Forecast Sheet

CRM • Reports • Forecast Sheet

 [DOWNLOAD EXCEL](#)

Proxa Company

Australia

Project Name

Alcoa Kwinana BEP

Scope of Project

DBO

Secured

Existing

Sector

VariousFood and Bev

Project Value

MinMax

QTY months/left

4

%Go

75%

%Get

75%

%Probability

51% to 75%

%Margin

51% to 75%

%EBITDA

Less than 25%

Project Start Date

01/05/2026 - 02/03/2026

Project End Date





01/05/2026 - 02/03/2026

TOTAL BP

MinMax

Search

Clear

SR#	PROJECT DETAILS	CLIENT	SECURED	SECTOR	PROJECT VALUE	QTY MONTHS/LEFT	%GO	%GET	%PROBABILITY	%MARGIN	%EBITDA	START DATE	END DATE	2025 REVENUE	2025 EBITDA	2026 REVENUE	2026 EBITDA	2027 REVENUE	2027 EBITDA	TOTAL
1	 Goldi OM	Astral	Existing	Various	\$15000000	12	100%	100%	100%	30%	30%	01 Jul 2023	29 Jun 2024	-	-	-	-	-	-	-
2	 Amos Dairies DB	Amos Dairies	Existing	Food and Bev	\$547096	03	100%	100%	100%	35%	35%	24 Jul 2024	23 Oct 2024	\$547096	\$191484	-	-	-	-	\$547096
3	 Alcoa Kwinana BEP DB(O)	Alcoa	Pipeline	Mining and Minerals	\$1794191	03	100%	100%	100%	40%	40%	24 Jul 2024	23 Oct 2024	\$1794191	\$717676	-	-	-	-	\$1794191
4	 V&A Growth point desal OM	V&A	Existing	Commercial	\$68161094	60	100%	100%	100%	19%	19%	01 Oct 2024	29 Sep 2029	\$10224164	\$1983488	\$13632219	\$2644650	\$13632219	\$2644650	\$3748164

CONTACT US

FOR QUESTIONS, COMMENTS,
AND MORE INFO

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