

Conferenceware

Integration with Pivotal

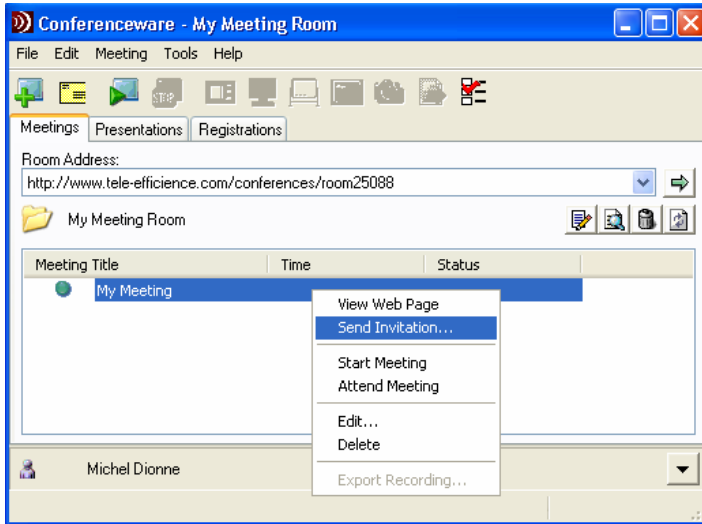


Tele-efficiency)))

Tele-efficiency is committed to helping our clients save their time, improve their synergy, and lower their traveling expenses. We offer superior WEBconference services at a fixed price under the trademark *Conferenceware*, integrated with most CRM applications and with Skype. Its interface is personalizable to the company. What's more, you can enjoy a free 30-day trial! Thereafter, you can continue enjoying the benefits of *Conferenceware* with a quarterly or an annual service contract.

From Conferenceware

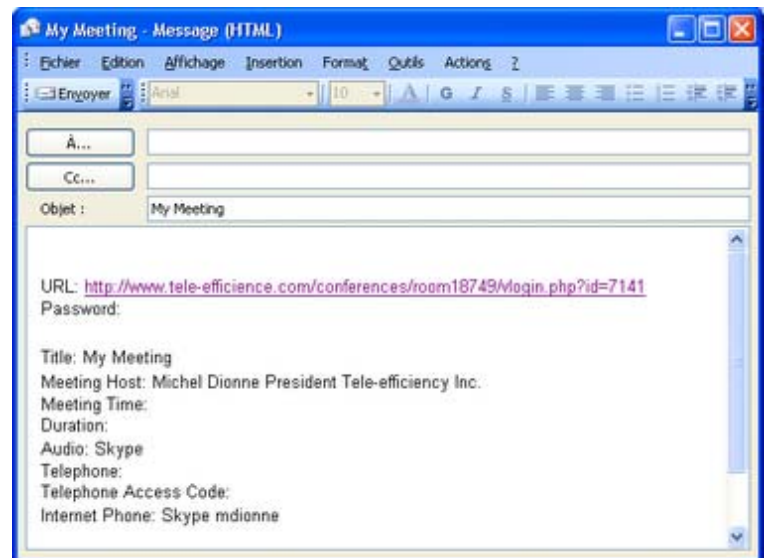
Conferenceware integrates with Pivotal as your email client per default or via Outlook. In fact, it generates automatically the data for an invitation; description, agenda and voice broadcasting mode, in the template of a new email.



You invite the participants by sending an hyperlink to conduct them directly to the meeting. Click with the right button on the meeting's name, when selected the letters of the name will become grass and select *Send Invitation*.

Through your email client software

The information required by the participants, like the hyperlink to get to the meeting, the time and date, the necessary password, if that is the case, are already in the email information that opens within Pivotal or Outlook.



Therefore, you only have to select people you want to invite amongst your contacts. Consequently, a copy of your invitation is saved with each contact file in Pivotal.

To Pivotal

eCRM



Tele-efficiency helps its clients to save time, improve their synergy and lower their travel expenses.

Offers WEBconference services at a fixed rate, under the trademark Conferenceware, integrated with CRM applications and with Skype. The greeting is customizable for each client's company image with their logo. Also offers a free 30-day trial period followed by a quarterly service contract or yearly.

Conferenceware is a trademark of Tele-efficiency Inc. The trademarks mentioned are property of their respective manufacturers. For more information, visit our WEB site under Contacts.

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Introduction

The Customer Relationship Management is first of all and before anything else, a business strategy technologically supported and not the other way around. It consists on identifying the value of the clients, to keep them, develop them and get new ones. In this perspective, the prospecting of acquiring new clients begins with [WEBinar](#) while sales in itself, especially the presentation to prospects, is done in [eSales](#).

Preparation

Make the difference between the development of current clientele and market prospecting. In the first case, contacts are identified and are established in the client's account. Therefore, is convenient to organize a presentation since Conferenceware automatically generates the information required for an invitation, the description, schedule and the mode for voice broadcasting within the format of a new message. From there, you just have to select the persons you want to invite among your contacts. Consequently, a copy of the invitation is saved in each of your contact's file, in your CRM software. In the case of prospecting by [WEBinar](#), the list of registered persons is imported in CSV format in order to automatically build contact information in your CRM software.

Progress

The objective of commercial presentations is usually to get information regarding the prospect's business problematic and to identify the persons with power among the organization that have the weight to make the buying decision making. Is through the interactive questionnaire that is possible to evaluate the preoccupations in terms of problems along with the buying criteria of each of the persons influencing the process. While meeting with them, you are able to identify each person's role within the acquisition, user, evaluator, and their level of knowledge, beginner or expert as well as their attitude: ally, neutral or hostile. In the case of acquired clients, the interactive questionnaire is precious to evaluate their loyalty particularly their disposition to make referrals.

Follow up

The report of a reunion indicates not only the participants but also the answers they have provided to the questions submitted: problems, retained buying criteria, loyalty index. From there, you should be able to prepare a differential proposal, showing by the grade of pertinence, your understanding of the client's needs. Moreover, by recording a meeting, in which voice and image are synchronized, it can be replayed to check the fine tuning and be kept in the file as an attachment to opportunity.



Intellisync for Pivotal® 5.9

Consistent information across the extended enterprise, on all devices

Intellisync for Pivotal 5.9 – Server Edition takes the effort and uncertainty out of PIM synchronization.

- **Focus salespeople on selling** by taking all effort out of synchronizing their contact, task, and calendar information from Outlook or Lotus Notes with their Pivotal system and ensuring their selling time is never taken up by having to resolve data conflicts and cryptic errors
- **Empower sales team collaboration** by enabling sales users to easily and quickly identify recent interactions with key contacts and customers, providing timely access to deal-making and deal-breaking information that keeps sales moving forward
- **Ensure regulatory compliance** with rules that require companies to track every interaction with their customers and prospects—do not introduce risk by relying on the sales team to remember to synchronize their PIMs with Pivotal

To learn more about Intellisync for Pivotal and how it can address your firm's unique needs, call 1-877-PIVOTAL (1-877-748-6825).

Intellisync for Pivotal 5.9 translates the “personally relevant” view of data in a Personal Information Manager (PIM) into the “organization-relevant” view shown in Pivotal CRM. Information accuracy and consistency is maintained seamlessly behind the scenes, invisible to the salesperson.

Ensure Customer Data Consistency

Customer relationship management requires relevant, up-to-date customer data. The sharing of current customer data gives businesses the complete view of customers they need to become more effective at marketing, selling, and providing service. To maintain data integrity, effective CRM solutions need to seamlessly integrate and synchronize data across multiple systems, access methods, and applications within the distributed organization.

Drive CRM User Adoption

Employees spend a good portion of their time working in popular PIMs, such as Microsoft® Outlook® and Lotus® Notes®. In fact, most professionals start their work day by looking at their e-mail and calendar, tracking their tasks for the day and consulting their address book of contacts. User adoption is high, since PIMs allow employees to maintain a view of their individual schedules, correspondence, activities, and contacts that is relevant, convenient, and helpful to them.

PIM usage by employees presents a potential problem for companies with a CRM initiative, because it can create a silo of information that limits the ability to build a 360-degree view of scheduled and historical customer/prospect touch-points. As a result, a critical component of a successful CRM deployment is the ability for end users to sync key information between their PIM and CRM systems. Regular synchronizing of contacts, tasks, and calendar events helps companies better serve customers and removes a significant barrier to CRM user adoption.

Enable Mobile Users

While offline and away from the office, mobile users can read and write to their offline PIM application. With Intellisync for Pivotal, upon establishing a connection to the main system, updates and changes to calendar, contact, and task information are seamlessly synchronized between Microsoft Outlook or Lotus Notes and Pivotal in the background—without requiring action from the user—ensuring that everyone in the organization has up-to-date customer data.

Use Industry-Leading Technology

Powered by technology from Intellisync Corporation, the recognized industry leader in PIM synchronization, Intellisync for Pivotal is a reliable and robust solution for maintaining consistent PIM information across the organization.