PIPELINER CRM FEATURES & FUNCTIONALITY

PHILOSOPHY INTO ACTION

Pipeliner

INTRODUCTION

PHILOSOPHY INTO ACTION

In our previous 2 ebooks, *Theory Made Real* and *Reducing Risk*, we demonstrated how Pipeliner CRM is the sum total, in the real world, of sound philosophical business principles. *Theory Made Real* explored the 6 basic principles that form the foundation for Pipeliner, with examples of how they are expressed in the product. *Reducing Risk* laid out the Pipeliner Selling System, which follows the basic pattern of a sales process against the backdrop of the buyer's journey, and how this, too, embodies the basic principles.

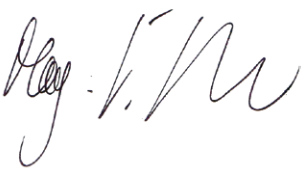
In this our third ebook in the series, we explore all the **specific Pipeliner CRM features—many of which are totally unique in the CRM market**—and how each of these reflects the philosophy which inspired it.

Our goal with this book is to bring the reader an understanding of the power that Pipeliner can bring to a sales organization and business, and also to provide a continuing overview of the applicable principles on which any business is based.

So as to be in alignment with the previous 2 books, in this book we have organized Pipeliner's features along each of the 5 steps of the **Pipeliner Selling System**, as found in *Reducing Risk*.

Our goal with Pipeliner is to be the total backbone of your enterprise—and empower salespeople and your organization to succeed like never before.

Sincerely,



Nikolaus Kimla
CEO of Pipeliner Sales, Inc.

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STAGE 1

FOCUS

As we saw in our last ebook *Reducing Risk*, the first stage of the Pipeliner Selling System, *Focus*, deals with:

- Focusing reps on deals that matter
- Honing in on specific aspects of the deals themselves
- Focusing the buyer in on your solution

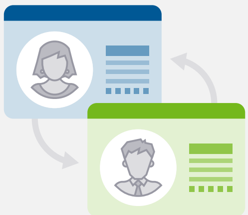
In the buyer's journey, the corresponding step is *Investigator*. The buyer is starting off by finding out all about the seller's product or service, as well as investigating alternatives.

Pipeliner Principle

The principle from the *6 Fundamental Principles Found in Pipeliner CRM* (found in the ebook *Reducing Risk*, link above) applies to the *Focus* stage is, appropriately enough, *Focus on Results*. With this stage you are identifying your best opportunities and keeping salespeople focused directly on them. These are the opportunities which will most likely *result* in wins.

Under the heading of *Focus* are the Pipeliner CRM features contained in this chapter:


NAVIGATOR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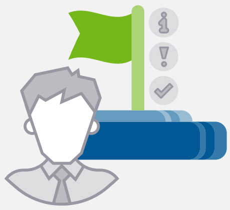
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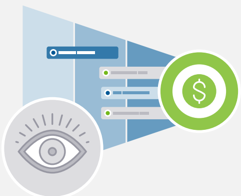
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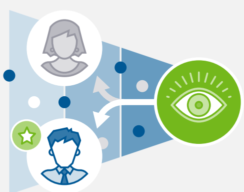
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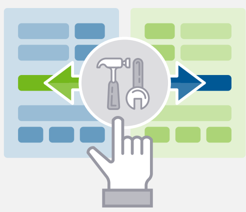

TEMPLATE DESIGNER: IT REALLY IS YOUR CRM


PIPELINER CRM'S BUILT-IN HELP

Navigator

With its breakthrough Navigator functionality, Pipeliner CRM moves far beyond the standard concept of a CRM dashboard. We have brought more focused and innovative ways of bringing instant intelligence to all users, no matter their function in the organization—intelligence that cuts out the noise for users, allowing them to easily navigate complexity and focus immediately, and in real-time, on what is most important.

Integrated Components

Our Navigator feature includes 5 integrated components, all in a single cohesive and intuitive view:

ACTIVITY STREAM

Navigator organizes you! The Activity Stream displays on the right-hand side of the Navigator, and consists of opportunities, activities and tasks in date order, beginning with those closest to the present. To gain more detail, you can simply click on any item to drill down for full information on whatever it may be—the meeting that requires your attendance, the call you need to make, the task that needs doing, or the opportunity for which a current sales stage needs to be completed. Salespeople will often have reminders in different places and applications for all of these different items. Navigator brings them to you all in one convenient, visual location.

TARGET OVERVIEW

Navigator focuses you! Combining our Dynamic Target feature with a Target Trend graph, the user can see progress toward a sales goal—through three different metrics, over a specified time period. The user always knows where they stand with regard to the target, and what they need to do to meet or exceed it.

NOTIFICATIONS

Navigator reminds you! Within the Notifications section are 3 different boxes: "Tasks" which displays the number of overdue tasks; "Missed Close Date" which displays to you the number of opportunities with missed close dates, "Velocity Issues" which inform you of how many opportunities are past due in getting moved to the next sales stage, and "Largest Open Opportunity." Click on any of these to instantly drill down to specifics.

SUGGESTIONS

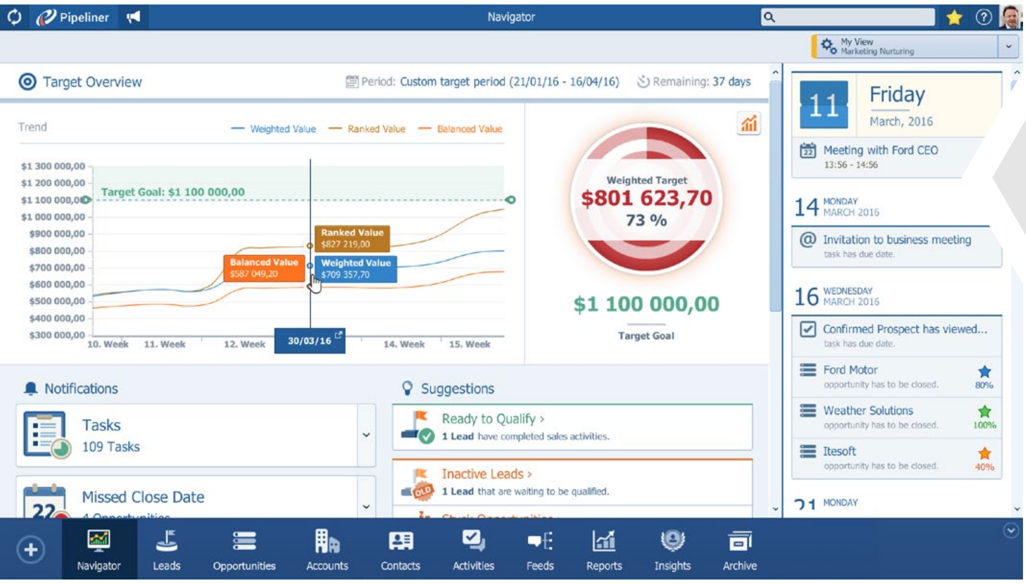
Navigator advises you! The Suggestions section advises you of other areas of action that should possibly be addressed, including New Leads, Stuck Opportunities, Inactive Leads, Inactive Accounts, Cold Accounts and more. Suggestions is there to guide and advise you to take proactive measures to improve your overall performance. It even suggests additional integrations that you can activate such as external storage solutions like Box or Dropbox.

With the **Notifications** and **Suggestions** sections, a salesperson is empowered to be well ahead of their sales manager—knowing all about issues and taking action before the sales manager even asks about them.

BUSINESS OVERVIEW

Navigator steers you! Graphically displayed within the Business Overview section are Open Opportunities, Open Sum, Won Sum, and Lost Sum—for the user-defined date range to which Navigator is currently set. A user can instantly review where their business stands: look in the rearview mirror at what has already occurred, and straight ahead to see right where it is going, allowing them to make timely adjustments for a speedy and successful journey.

A View For Every Level of the Sales Organization: There is one factor (out of many) that puts Navigator light years ahead of the competition: you can apply all of Pipeliner's profile and filter features to it. Navigator can then be viewed from the standpoint of a single user, a sales unit, or the entire sales team. Additionally it can be viewed through numerous other lenses such as closing possibility and revenue level.

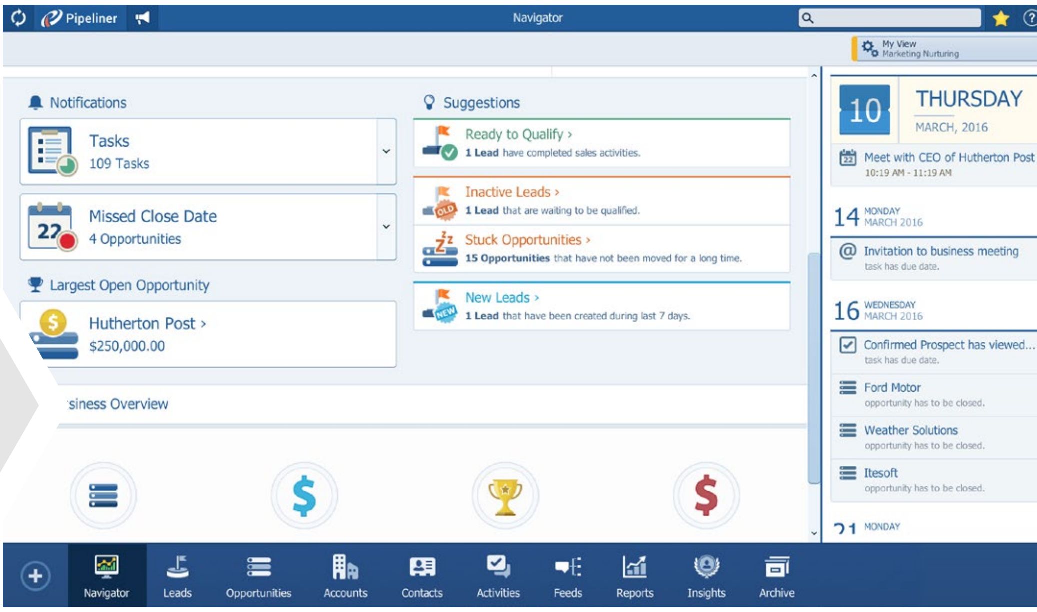


Navigator Forecast

Navigator focuses you – Combining our Dynamic Target feature with a Target Trend graph. You can instantly review where business stands with Business Overview.

Notifications and Suggestions

With the Notifications and Suggestions sections, a salesperson is empowered to be well ahead of their sales manager—knowing all about issues and taking action before the sales manager even asks about them.



Dynamic Contact Management

As with other functions commonly found in CRM applications, contact management within Pipeliner goes well beyond ordinary contact management—it is totally visual and dynamic.

Pipeliner has made it as easy as possible to locate the information you're looking for. From the account view, you can readily see all associated contacts and opportunities. From opportunities, you can view related accounts and contacts.

Likewise when accessing a contact, you can immediately see the opportunities, activities, tasks, notes, social messages and email, and other information related to that contact—in one view. You can then click on any needed item within the contact for more data.

Pipeliner allows you to connect any web page from an external web site such as Google Maps to a contact.

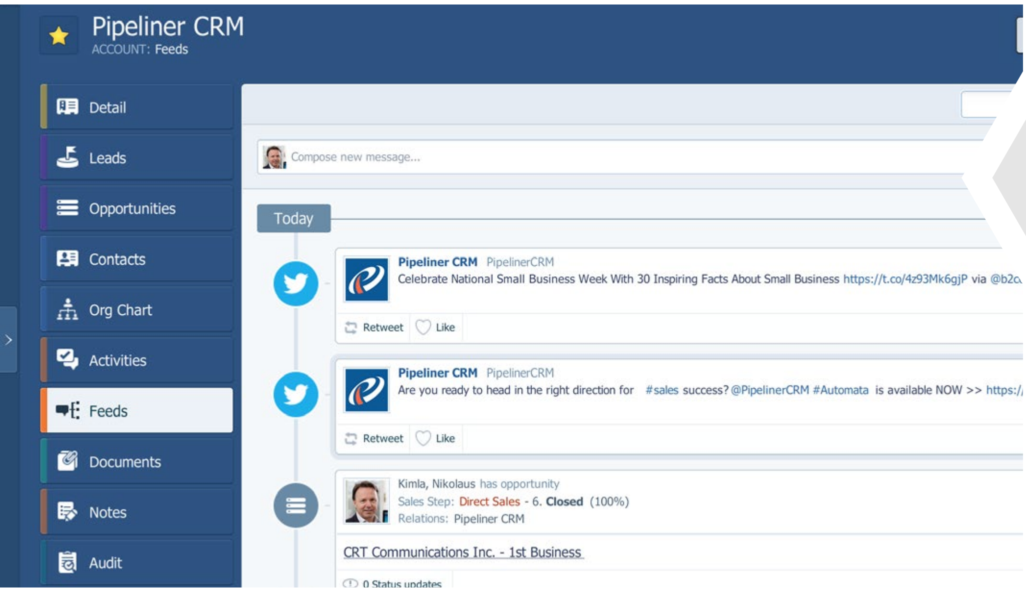
From the contact, you can immediately send messages, and add opportunities, activities and documents to the contact view without ever leaving the screen. You can also associate activities and reminders to that contact, and set up email notifications to update you (or others associated with this contact) when events occur. And as with many functions in Pipeliner, the fields within the contact view are customizable.

Multiple Contacts and Multiple Accounts

A contact can, in the real world, be related to more than one account. If this is the case, Pipeliner allows you to reflect that fact in CRM, too. In fact, we're the only CRM that allows you to connect multiple contacts to multiple accounts.

Pipeliner's Auto-Profiling feature makes it easy for you to fill in contact data. Simply fill in an email address and Pipeliner will search out and add in a picture, address, telephone, social accounts and more.

Additionally you can see, right away, the last time this contact was contacted, and by whom.

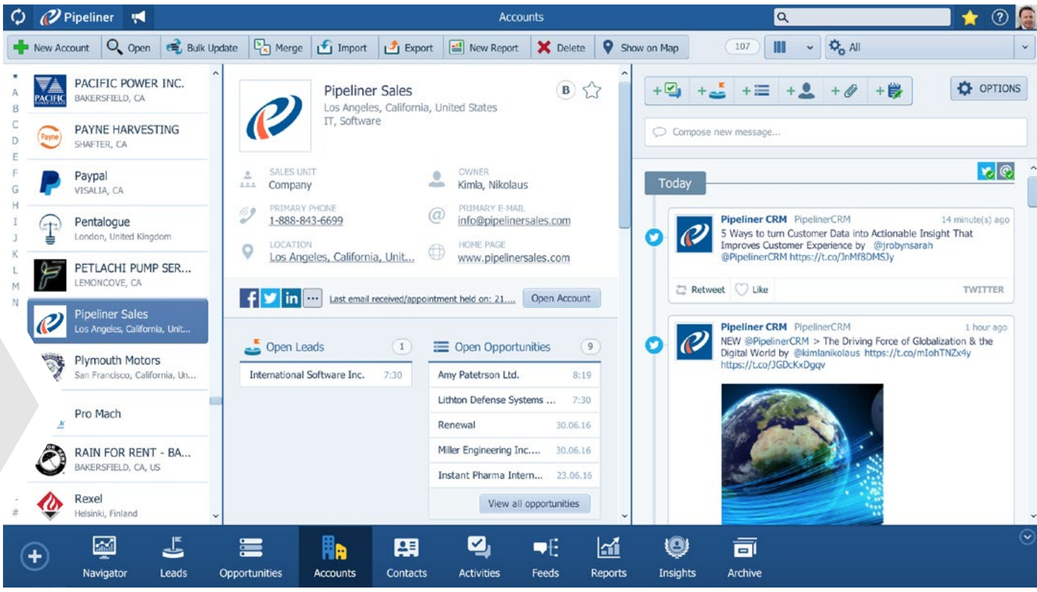


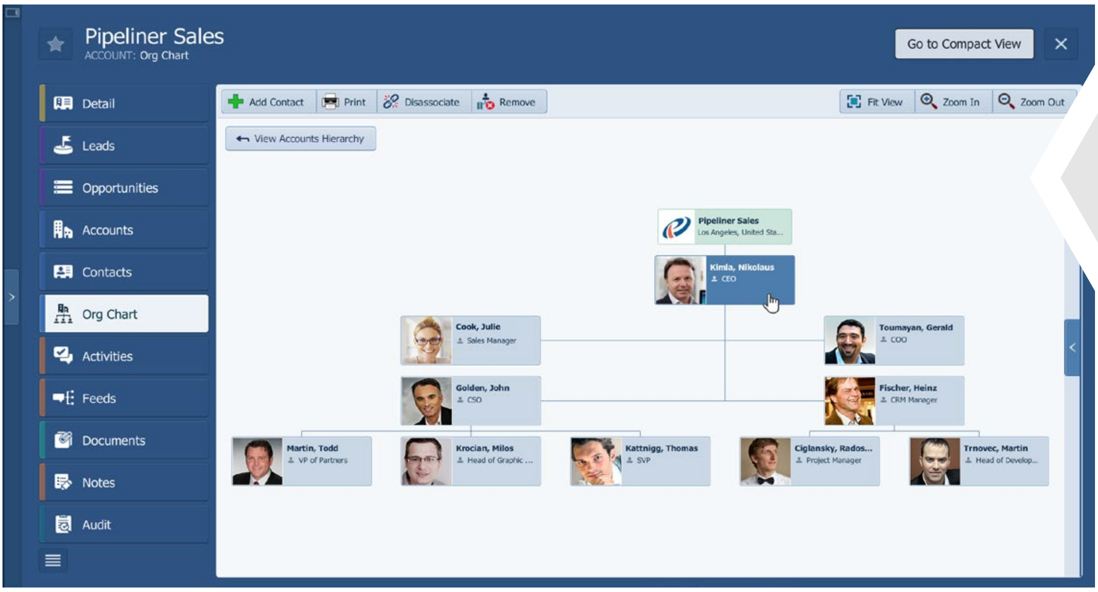
Feeds

You can immediately see the opportunities, activities, tasks, notes, social messages and email related to that contact in one view. Click on any needed item within the contact for more data.

Contacts Compact View

Compact views allows you to see all detials about the given contact, previous comunication and activities.



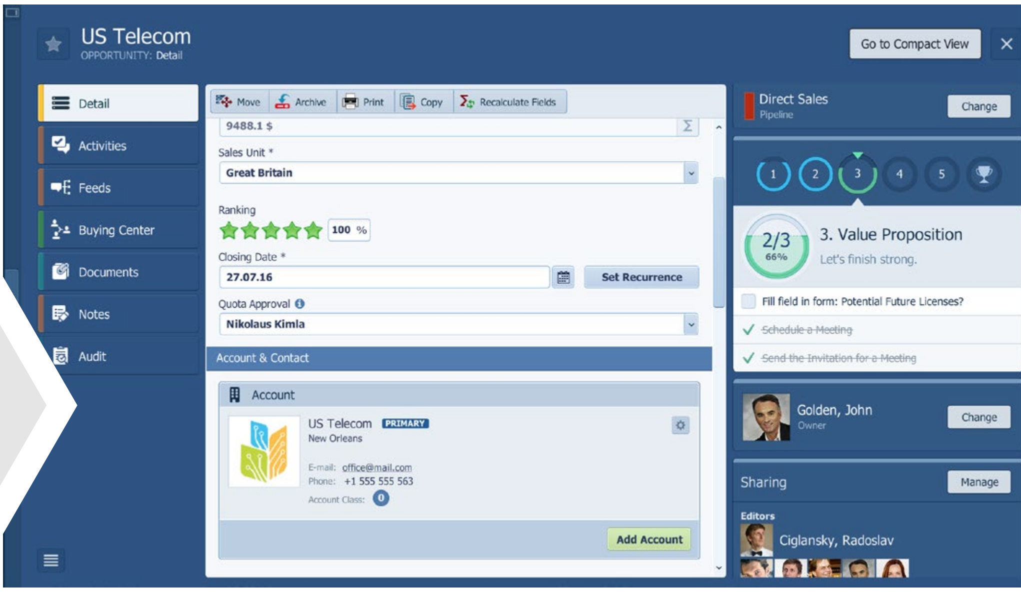


Org Chart

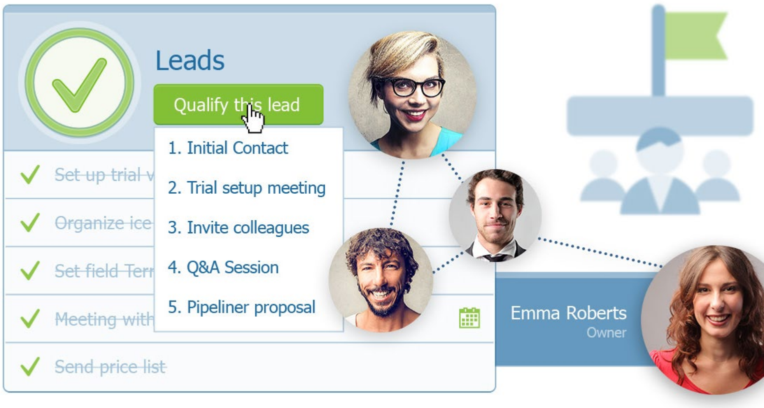
Assign a parent account to an existing account. Create a visual organizational chart of your account structure.

Account Parenting

With our new Parent Account feature, you can assign a parent account to an existing account. You can also select a particular account, and aggregate data from multiple accounts into that selected account.



Lead Management – Your Constant Path to Tomorrow's Opportunities



In sales, it always comes back to leads. They are the very foundation of any sales activity.

There is always a sales quota to be made. That quota will not happen without adequate opportunities—and the opportunities won't happen without adequate leads.

Leads don't come cheap, and we at Pipeliner know how precious they are! For that reason we have made visual, intuitive lead management one of Pipeliner's premier functions.

Entering the Pipeline

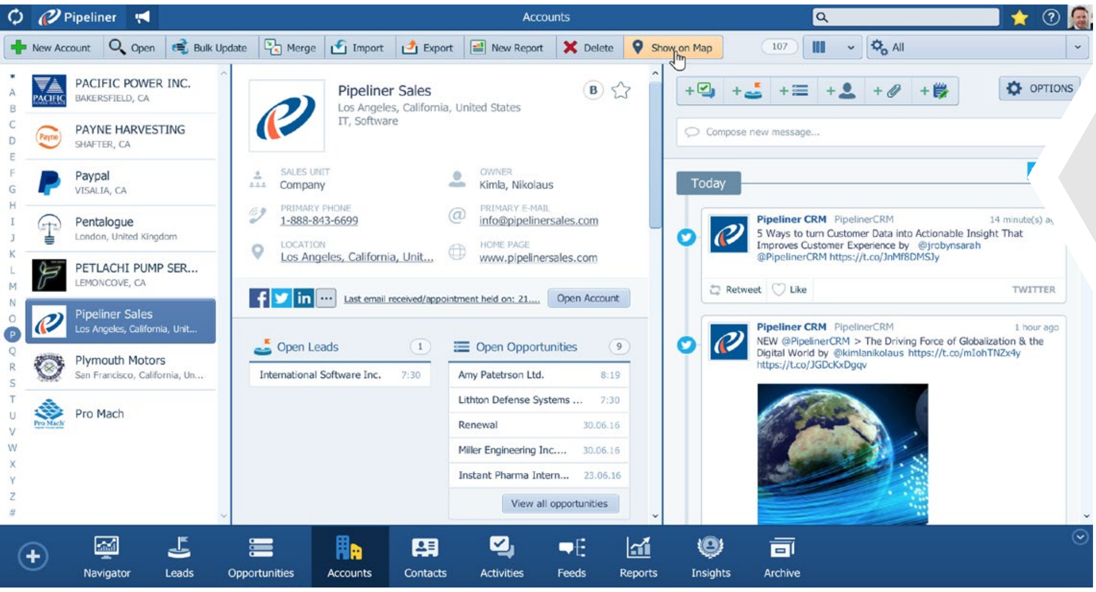
Leads can be entered into Pipeliner manually, imported through .CSV files, or automatically imported from web forms.

In Pipeliner CRM's Pipeline View, leads have their own section, in which they can be readily seen, assigned and qualified. Leads can be taken by assigned reps, qualified and then moved along the pipeline (converted into opportunities), sent back to Marketing or Sales Development Reps (SDRs) for further nurturing, or archived. Leads are easily dragged and dropped within Pipeliner CRM.

Once the lead becomes an opportunity, it is scored and ranked according to its chances of closing. The lead-become-opportunity will then show up in every Pipeliner reporting and opportunity tracking function. It will remain plainly visible to the rep until it is a won or lost deal.

Any lead or opportunity that is archived will keep all its relevant data intact. If at any time the lead or opportunity comes back to life, it can be reactivated with a single click.

> “Companies that excel at lead management generate 50% more sales-ready leads at a 33% lower cost.”
>
> *Penton Marketing Services*

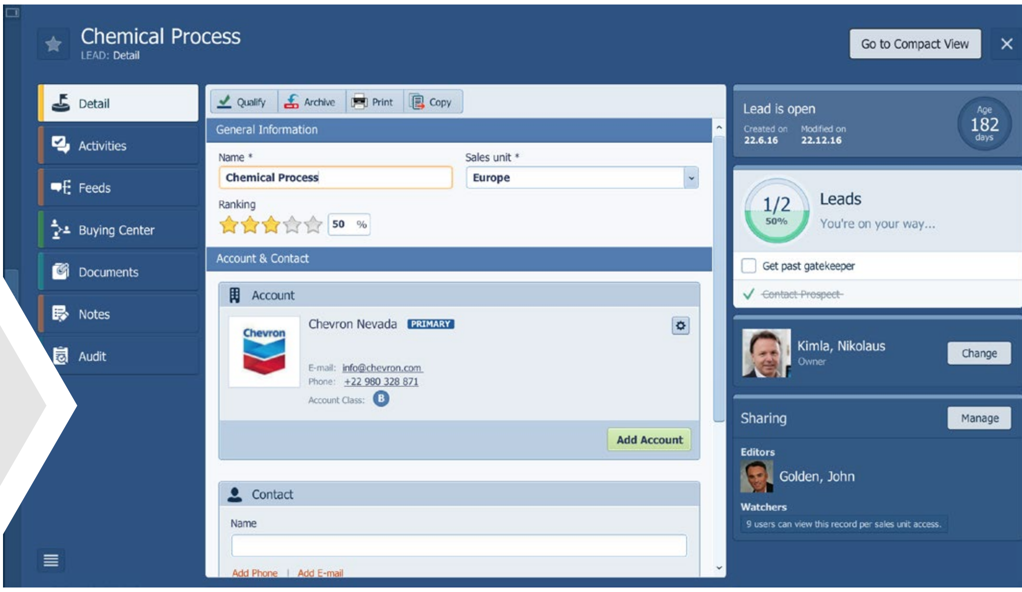


Accounts Compact View

Compact View of your Accounts allows you to see all necessary information instantly

Lead Detail

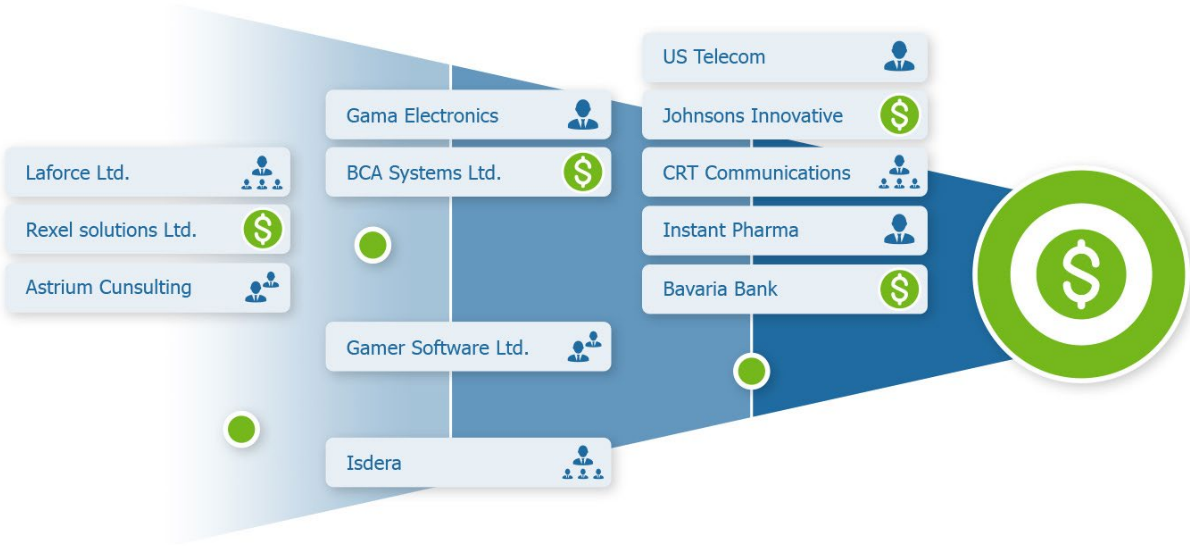
In Lead detail you can specify the information available before the Lead is qualified.



The Pipeline View—The Most Important Screen in Sales

The most important feature of any CRM is its interface. When an interface is non-intuitive, showing rows and columns of numbers like a spreadsheet, it is then left to the user to visualize the actual pipeline, and opportunity progress within it.

Pipeliner's mission is to take this visualization out of the imagination and into the real world—and it all begins with Pipeliner's primary interface, the Pipeline View. It is a totally visual view of an entire pipeline, replacing the need for toggling between different screens, as found in many other CRM applications.



The View

In the Pipeline View you have a graphic representation of your sales process, with its distinct sales stages. Within each sales stage you can instantly see exactly where each opportunity lies, along with how long it's been there, if it's overdue, its chances of coming in, and numerous other factors.

If you mouse over any opportunity you can gain a Quick View—showing value, ranking, close date, recent and upcoming activity, and more. In a similar way you can mouse over any sales stage for a summary of that stage, including total value, number of opportunities, average time in step, and more.

Movement of opportunities between stages is a snap—simply drag and drop opportunities from one stage to the next.

Target

To the right of the screen, always in view, is the Dynamic Target. It is a constant reflection of your up-to-the-minute progress in any given sales period, and can be utilized in 5 different target views. The Dynamic Target can also be customized to take different views of the pipeline for analysis and forecasting.

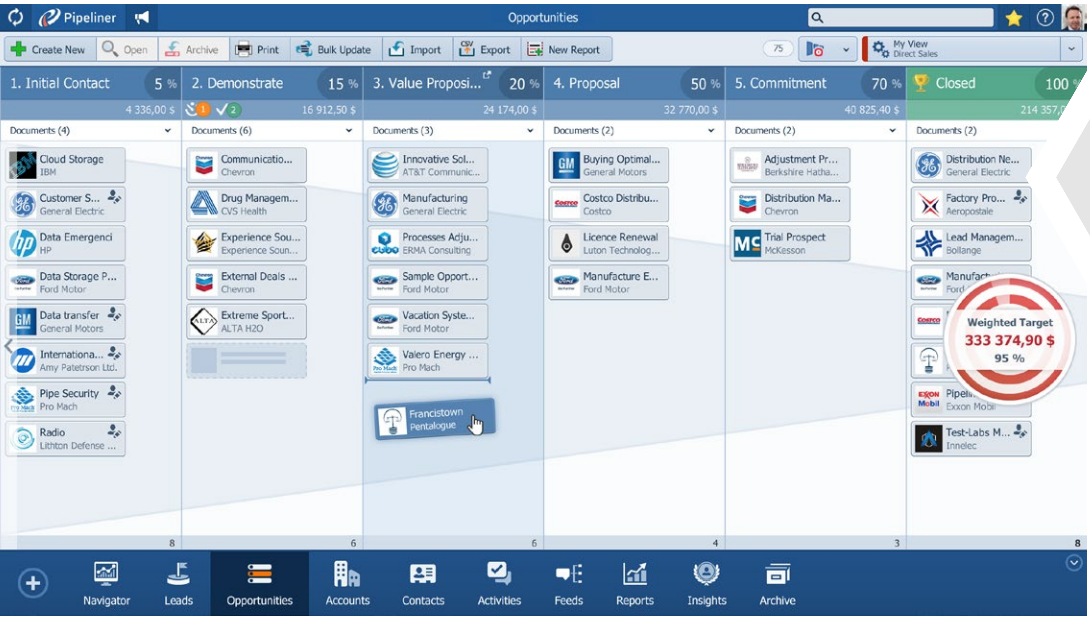
Location and Focus Assistance

As a shortcut to locating important accounts, you can access "Recently Opened" and view the accounts you have been active with, the most-recent first. You can also mark specific accounts as "Favorites"—just like you can with a web browser—so they can be easily found again.

If you are a manager and wish to focus on a particular rep or territory, click on the "gear" icon in the upper right. You'll then be able to view the progress and the results for that entity only.

Archive

Unique to Pipeliner CRM, the Archive is where your lost deals are stored. The Archive is constructed exactly like your live sales pipeline so that you can see in which stage a particular deal was lost, along with all its data. If it should happen to come back to life, an archived opportunity can be restored with a single click.

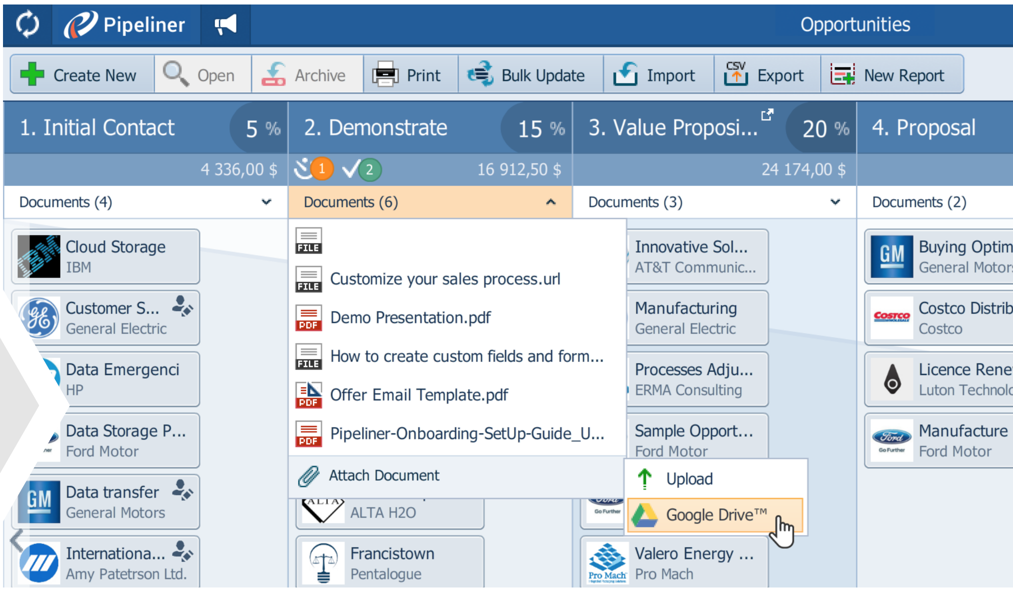


Opportunity Drag and Drop

With Pipeliner CRM you can visualize your Sales Pipeline, and Drag and Drop opportunities to various stages of your Sales Process

Pipeline View

The Pipeline View can give you an instant insight into your deals and deals of your sales team. You can even access important documents and opportunity details right from this screen.



Bubble Chart Timeline: A 3D Map of Opportunities

Sales professionals are always looking toward the future, at when which opportunities are scheduled to close. But in doing so, there must be exact relevance to the view:

- In which sales process stage does the deal reside?
- What is the estimated close date?
- How big is the deal, and what are its particulars?

With Pipeliner's 3D Timeline all of these aspects are instantly seen. Sales pipeline stages run up the left-hand side. The timeline runs from left to right, and the size of the deal is expressed in the size of the "bubble." Simply mouse over or click on a bubble for a closer view of that deal.

Pipeliner CRM now brings you complete timeframe understanding – instantly, visually.

Target View

The Pipeliner Dynamic Target View is always visible in the Bubble Chart Timeline. Your sales goals are always plainly in view.

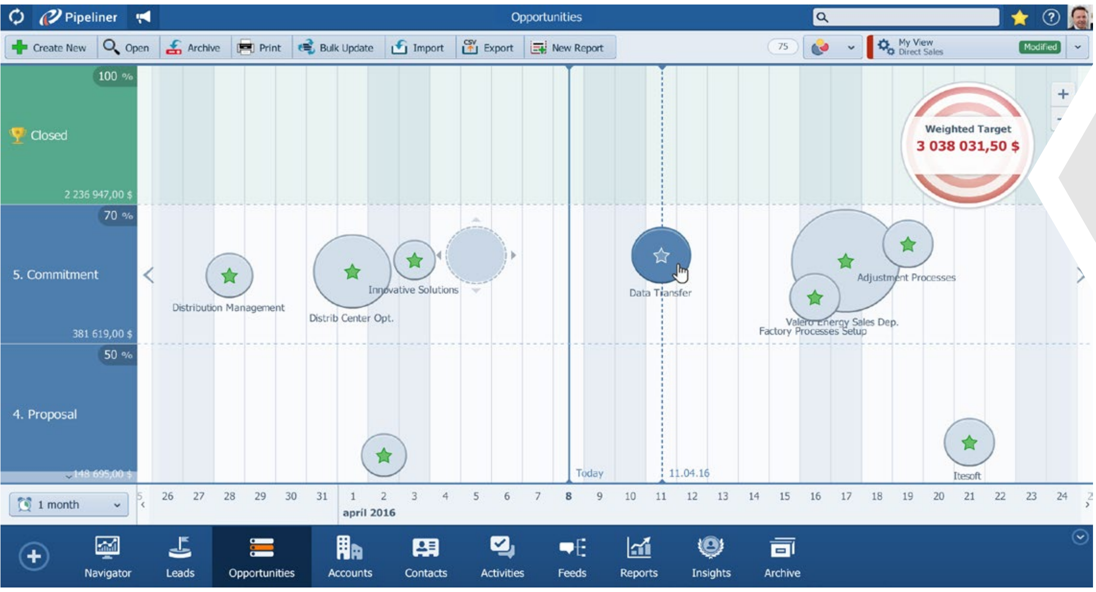
Filter for Closer Look

You can utilize the same filters used for the main Pipeline View, to zero in on specific account types, rankings, dollar amounts or other parameters. This adds even more analytic functionality to your 3D timeline.

Analysis Action

Within the 3D timeline you can take actions:

- Click and drag the Timeline right or left to instantly view the number of deals in any time period.
- Click and drag any deal to change its close date.
- Click and drag deals from one pipeline stage to another. Instantly create a Timeline Report.
- Opportunity Groupings - Pipeliner offers numerous choices with which you can visually and logically group opportunities, for specific on-the-spot analysis, such as ranking, company logo, and velocity.



Bubble Chart

Pipeliner CRM's 3D Bubble Chart Timeline gives you yet another view of your opportunities, graphically providing the most relevant aspects of every deal.

Archive: Understanding the Past is Key to Your Future

The Sad Fate of Lost Deals

Often, when a deal is lost, so is most of the data connected with it. What happens if, several months up the line, that deal comes back to life? All details associated with it—such as **pricing, contacts, tasks, and documents**—must be reconstructed. It can mean a lot of work and wasted sales time.

Further, without full information on losses, how can you ever analyze why you are losing deals?

- At what sales stages are deals commonly failing?
- Which reps are losing them, and when?
- What other factors such as price or competition might be involved?

If the data is lost, you cannot. To a greater or lesser extent, you are flying blind—and losing revenue.

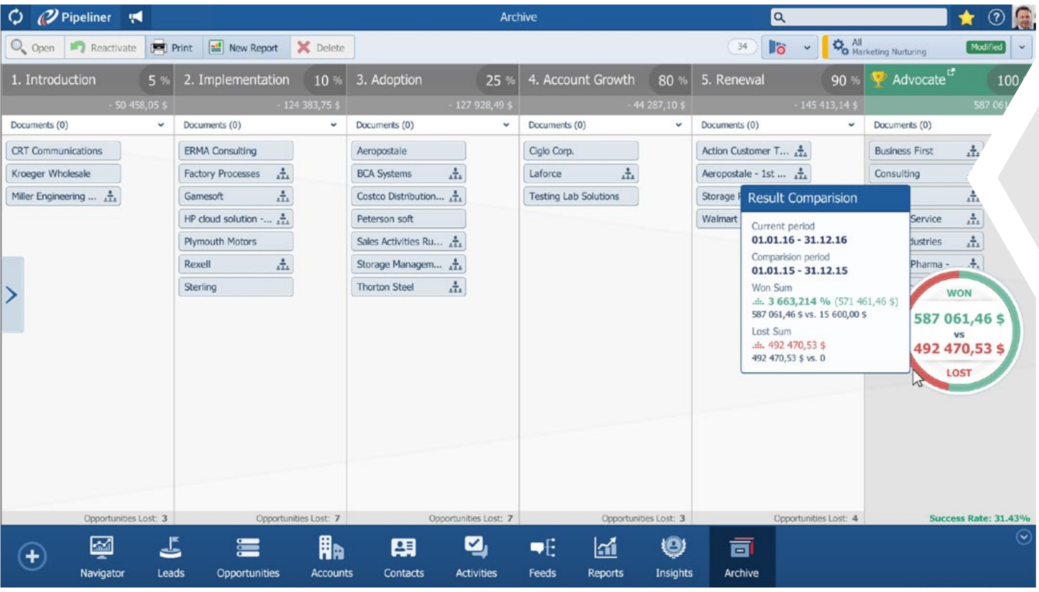
The Answer: Pipeliner CRM Archive

The Pipeliner CRM Archive tool—totally unique in the CRM market—means none of the above ever happens:

- Archived leads and opportunities are arranged exactly as in the active Pipeline View
- Leads and opportunities contain all information present when they were archived—including documents, emails, notes, social media interactions, tasks, and activities
- Leads and opportunities can be restored to the active pipeline with 1 click.

Analysis can be conducted of lost opportunities to discover vital factors such as:

- at which sales stages you are losing the most deals
- which sales reps need mentoring and coaching, and in what areas
- which products or price points are losing you the most deals
- accuracy of close dates and lead scoring
- and much more...

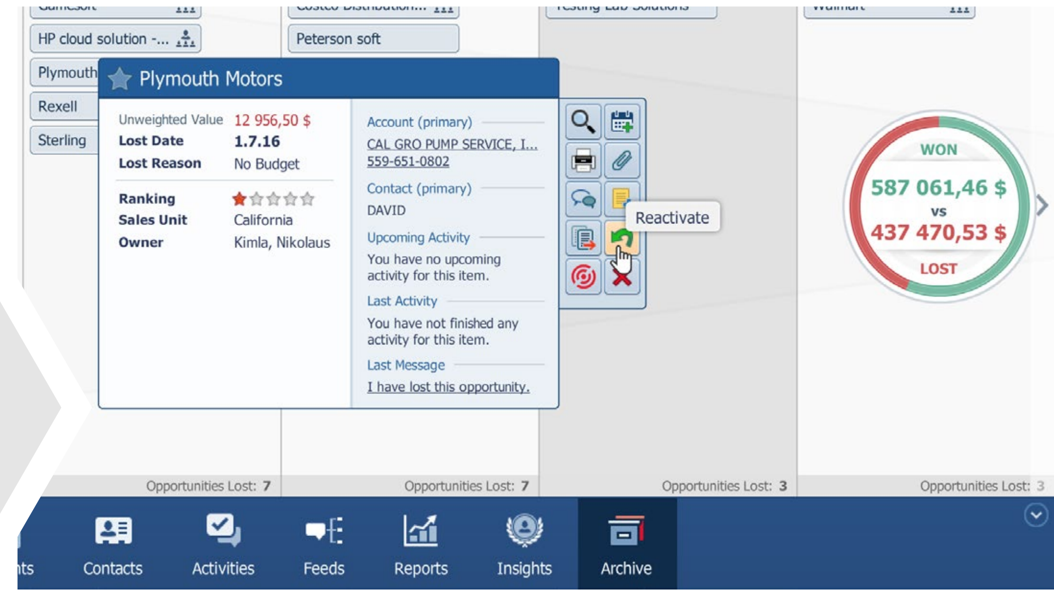


Sales Archive

The Sales Archive can give you an insightful overview of where any deal was lost – including all details included when the opportunity was in the live pipeline.

Reactivate a Deal

False alarm? Deal come back to life? Any Opportunity in the Archive can be fully restored to your sales pipeline with 1 click - no data lost.



Pipeliner CRM Profiles: It's Your View

Pipeliner CRM Provides the View You Need

Pipeliner offers you many ways to **visualize and instantly filter data so that you can have the precise view** you need. But beyond that, Pipeliner allows you to **save views** that you know you're going to regularly use—with our **Profiles Feature**.

For the Salesperson

A sales rep is generally going to want to see all their sales, and how their target achievement is going—views which would be contained in one Profile.

But with Pipeliner's Profiles Feature, that **salesperson can create other Profiles**. For example:

- **Commissions** for a time period
- Commissions against **sales quota**
- Sales of a particular product or service
- Sales to a particular client

With Pipeliner, create Profiles in minutes, and save them so they are instantly accessible at any time. A user can **create as many Profiles as they like**.

For the Sales Manager

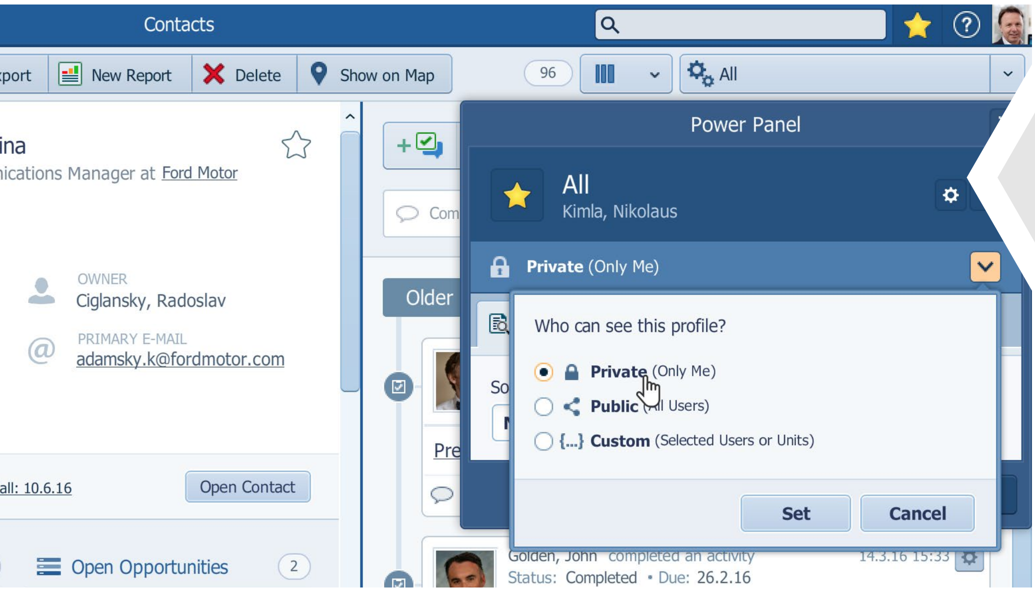
A sales manager will always have a Profile that contains a **view of the entire sales team**. But like the salesperson, they might want to create other Profiles specific to the industry or analytics they consider important. For example:

- Sales over a certain price point
- Sales of a particular product line

- Sales of a particular group or territory
- Sales of the leading rep

Sales manager time is extremely valuable—and **customized Profiles** mean instant access to views specific to their position.

Profiles can be **private** (only to the user), **public** (shared with everyone) or only **shared with specific others** (customized).

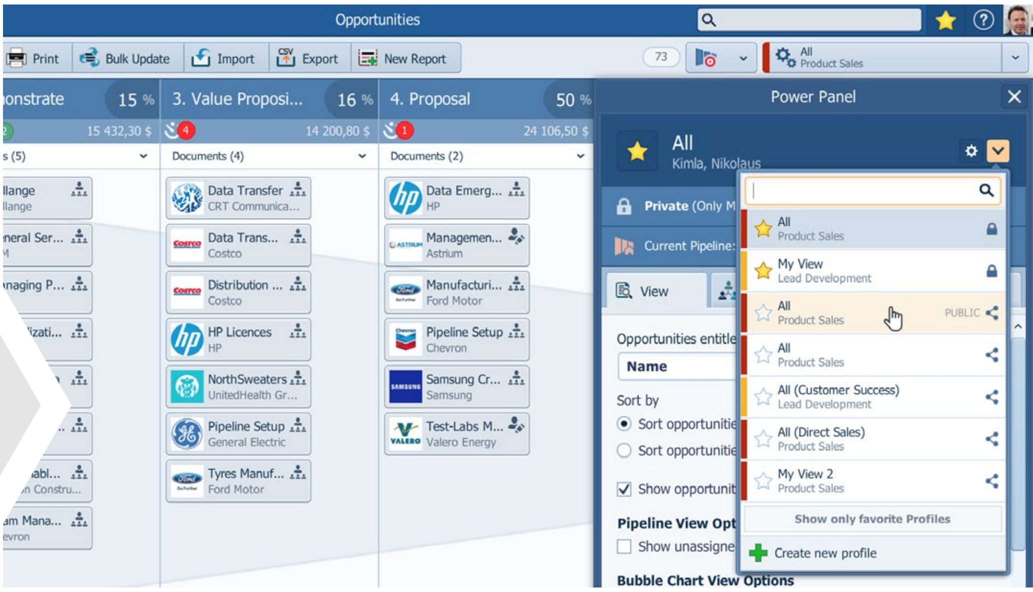


View Profiles

Profiles in View option allows you to see just the Opportunities and Contacts you are looking for and reduce the noise.

Profile Manager

With Profile Manager you can set up, save and share profiles you regularly use.



Template Designer: It Really Is Your CRM

A CRM solution is only as good as its flexibility – it must be **easily and rapidly customizable** to a company's specific needs. Otherwise, the company is having to adapt itself to the CRM system—a fast way for any tool to fall out of use and become an enormous waste of time and money.

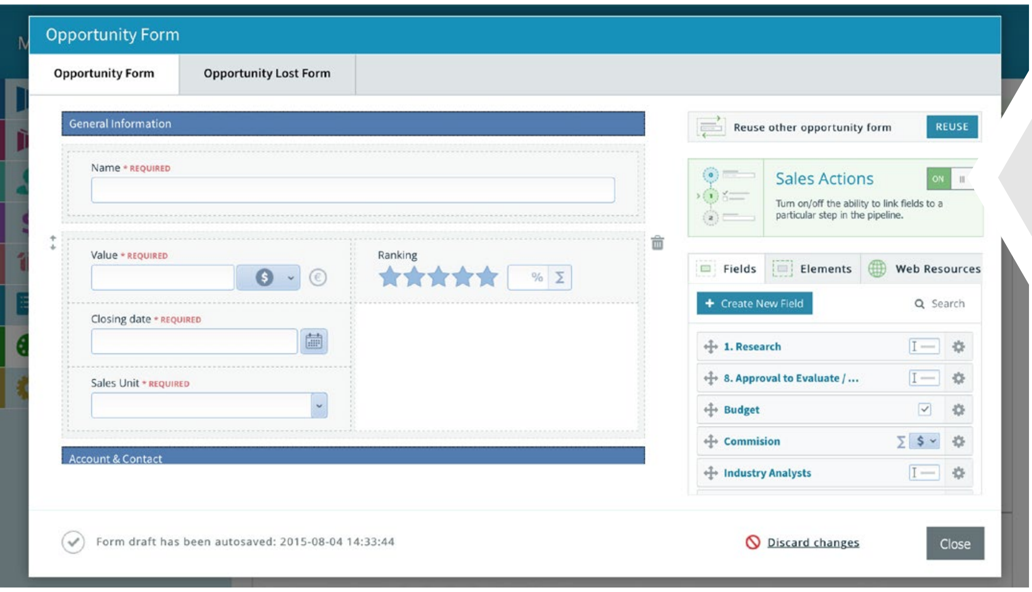
This is also important for the data forms within the CRM software—no two companies are going to use the same fields, the same arrangement of fields, or even the same field names. That's where the Pipeliner CRM Template Designer comes in.

Adapt on the Fly

With the Pipeliner Template Designer, you can **pick a form design, easily drag and drop fields, set up columns, name and customize fields**, and perform other necessary functions to make Pipeliner your company-specific CRM solution. It doesn't require an admin or software engineer, either—**anyone can do it**.

Only you know how your forms should be set up to optimize user focus and require the least amount of data entry and retrieval time. We give you the tools to rapidly and easily accomplish that goal.

We also know that in business, nothing stays the same for long. Up the line you'll probably have the need to change or alter forms–and it will be just as easy as creating them in the first place.

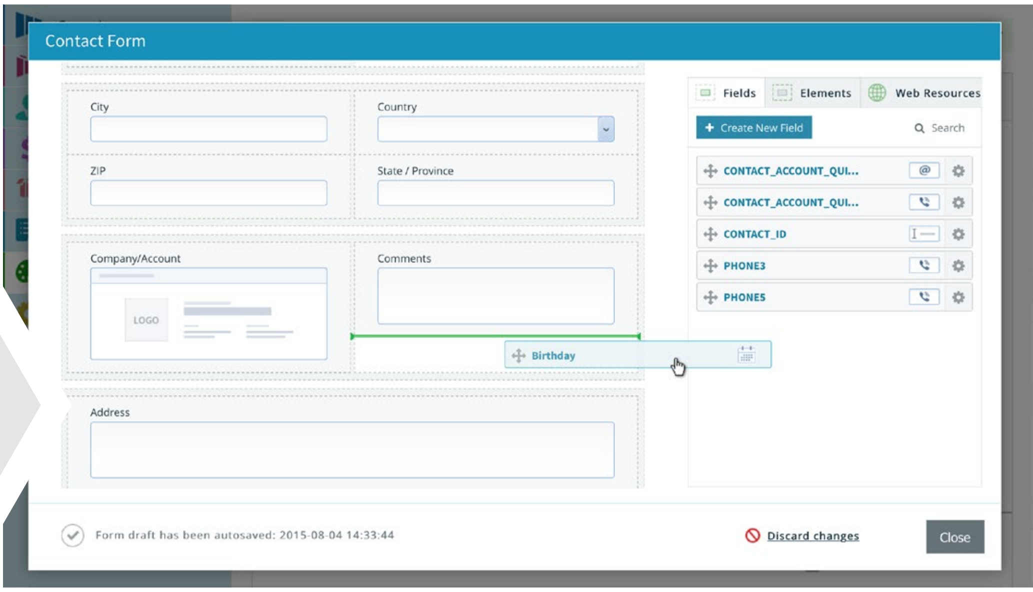


Design Your Own Opportunity Form

What qualifies an Opportunity in your sales process? With Template Designer, you can customize your opportunity forms.

Design Your Contact Form

Pipeliner allows you to customize your Contact Form, giving you total control on the data being entered into your Sales Pipeline.



Pipeliner CRM's Built-In Help

The Help functions with a software app can be problematic. In the old days, you had to leaf through a thick, hard-copy manual. Later on it was a little better—help was available electronically. But you still had to scroll through it, find what you were looking for, and then relate it back to the app.

Our own experience with application help prior to Pipeliner is exactly what inspired us to create the **totally unique built-in Help functionality** we have in the product today.

You can access Help from any feature in the software, and a Help screen about that feature appears. "Hot spots" are embedded throughout – click and an explanation of that particular functionality (where that "hot spot" was located) will then show up on the right-hand side.

Greatly Reduces User Training

Our **Built-In Help improves the effectiveness of (and time spent on) user training**. For many features, a user can simply go to that feature in Pipeliner, select Help from the Tab Menu and learn all about it themselves. This is also handy if a user forgets some of the training they received. They can just select Help about any feature – and always be able to refresh their knowledge.

Other Helpful Tools

From the Help menu at the bottom right of any Pipeliner screen, you can also access:

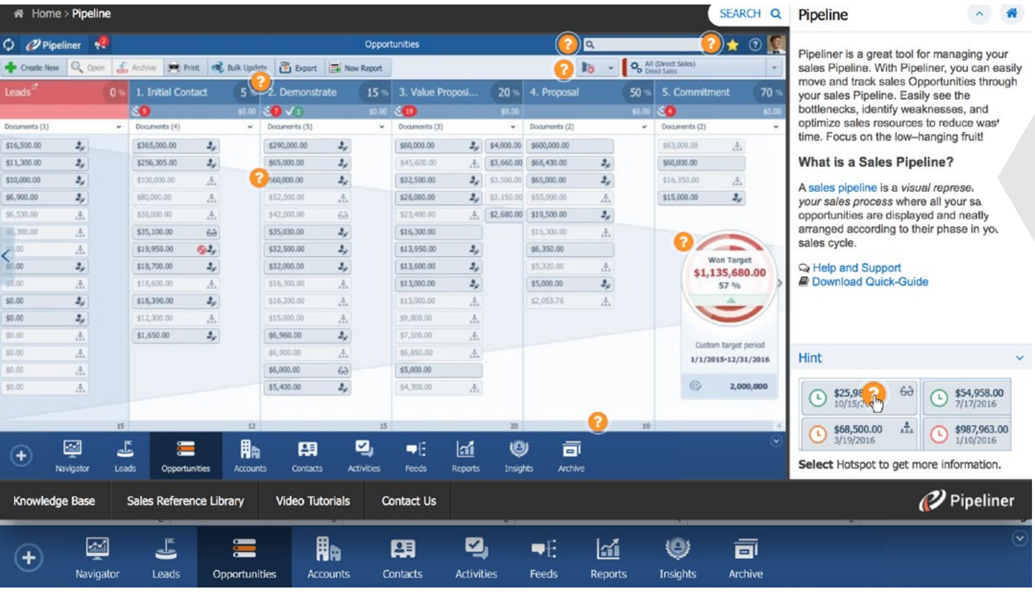
- **About Pipeliner** – General information about the product
- **Getting Started** – A "Quick Start Guide" to get any user off the ground
- **What's New?** – A tour of the latest version and features
- **Contact Support** – A form to contact Pipeliner Support without having to leave your CRM

- **Product Feedback** – Leave product feedback on our Forum page

Another way to access Help is through the Home icon button in any Help screen. This will give you an index of all the Help topics available.

Bonus Features

Our Help efforts aren't limited to our product. In the Help Index, you can access our **Sales Playbook**. Here you will find explanations about basic selling tactics and how Pipeliner can support you.

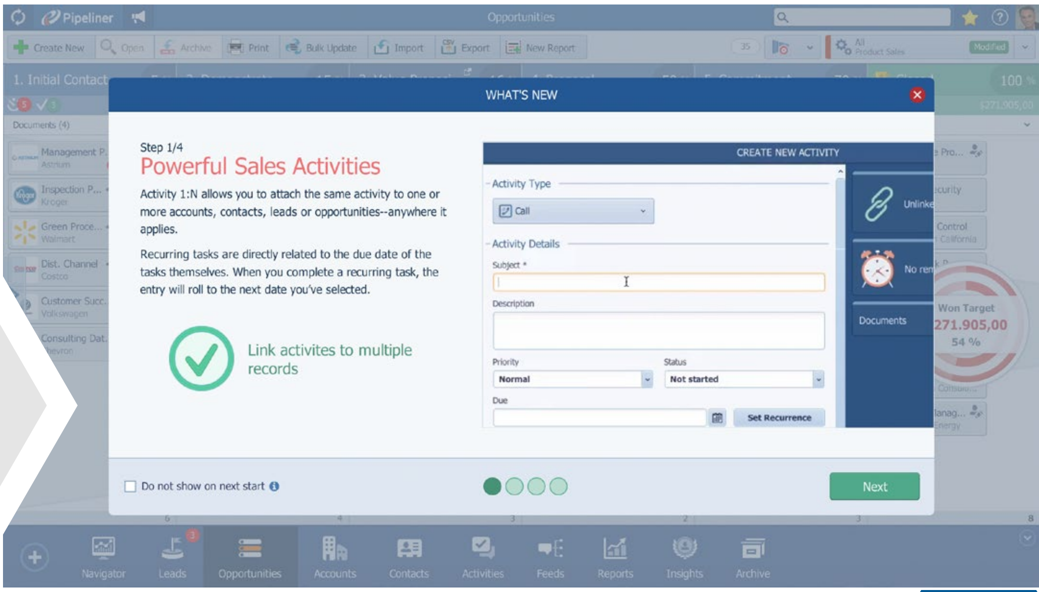


Built-In Help

Pipeliner's Built-in help allows you to access help from any screen of the application.

Welcome Screen

The Welcome screen can provide you with helpful tips and tricks to get you started and get Pipeliner CRM up and running in no time.



STAGE 2

ENGAGE

As we saw in our last ebook *Reducing Risk*, the second stage of the Pipeliner Selling System, *Engage*, means reaching out and touching this prospect, getting involved with their particular company and issues, and accomplishing the actions necessary to move them to the next stage toward a sale.

In the buyer's journey, the buyer has moved to the *Prospect* stage. They are definitely interested in your offering and are checking it out further.

Pipeliner Principle

The principle from the *6 Fundamental Principles Found in Pipeliner CRM* (found in the ebook *Reducing Risk*, link above) that applies to the *Engage* stage is

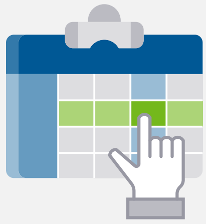
Contribution to the Whole. You are gathering information and gaining a total understanding of how your product affects each area of the prospect's company, how it contributes to the whole of that company overall, and how your buyer fits into the company.

You are also guiding the buyer to a further understanding of how your product or service contributes to the whole of their operation.

Under the heading of *Engage* are the Pipeliner CRM features contained in this chapter:

SALES ACTIVITIES—YOUR PATH TO SALES SUCCESS

SOCIAL SELLING MADE EASY

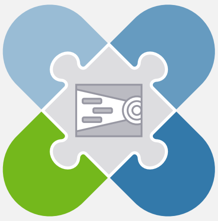


SALES REPORTS: MEANINGFUL, POWERFUL INSIGHTS—FOR ANY USER

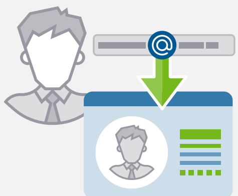
TRACKING SALES EFFICIENCY: THE HIT RATE MANAGER

ONLINE OR OFFLINE: FULL CRM FUNCTIONALITY

NOTES MANAGEMENT AND INTEGRATION



PIPELINER APP INTEGRATIONS



AUTO-PROFILING: SAVING HOURS OF ADMIN WORK

HISTORY LOG: TRACKING CHANGED DATA IN CRM

Sales Activities—Your Path to Sales Success

Studies show that over an hour of each salesperson's day is spent chasing and validating information internally within the organization (almost 6 hours lost per week!). Pipeliner CRM helps turn those hours back into selling time by making managing and executing tasks a simple process while at the same time streamlining communication.

Pipeliner CRM provides an intuitive and visual way of managing daily tasks. This allows salespeople to update the status of each task, comment on it and collaborate all in one place.

You can make your to-do's visual with Pipeliner CRM:

- **Drag & Drop Activities Task Board** that visually displays your daily tasks and which are integrated with emails, social interactions and reminders
- **Sharable Tasks and Activities** make the progress of the entire team transparent, which makes managing and delegating tasks simple and efficient

- **Task Management Filter** that gives you option to search and filter your tasks and opportunities easily
- **Two-way Integrations** with other task management software (**MS Office, Google Calendar**) will ensure that anyone can migrate their to-do lists into Pipeliner
- **Calendar** view to view information in multiple display formats

Sales Process that Motivates the Sales Force

Every sales process is unique, dynamic and continually evolving. Pipeliner CRM is built to support this dynamic process. Some sales processes are flexible, and some require salespeople to follow a certain path with each opportunity. Pipeliner CRM allows you to make stages and steps mandatory or leave them as optional—the choice is yours.

Salespeople can sometimes become overwhelmed managing opportunities that are in different stages of the pipeline, and each with different needs. Pipeliner helps keep them focused and organized by allowing you to set a series of required activities that are linked to each particular stage.

With Pipeliner CRM's unique Sales Activities feature you can:

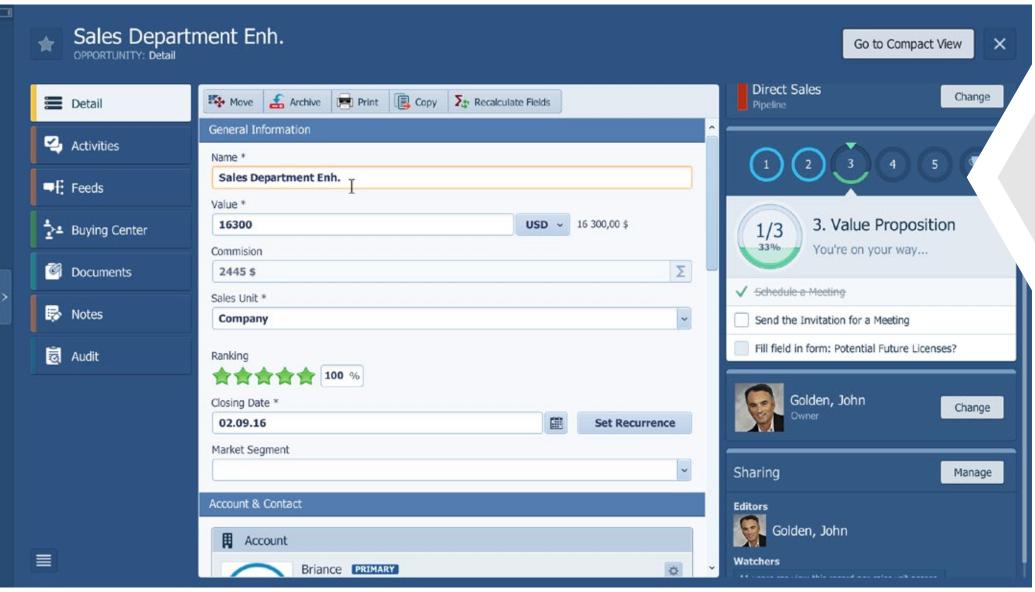
- **Motivate** salespeople with visual progress displays
- **Collaborate** – Salespeople can follow the status of various tasks delegated to other team members, or discuss hot topics relevant to a deal
- **Coach** thorough sales activities, deliver insights and support your team members
- **Improve your reports by specifying which activities and data are necessary** to finish for each opportunity - giving you all the information you need to create truly valuable reports

Better Time Management Makes For Better Sales Effectiveness

Pipeliner takes the approach of **enabling the right sales activities at the right times** – increasing sales effectiveness throughout each stage of your sales process.

Research shows that companies with a well-defined sales process consistently outperform their competitors. Making tasks and activities well-defined, targeted and efficient is the best way to make your sales process effective.

Pipeliner CRM gives you the unique opportunity to customize your sales process and tweak it to perfection.

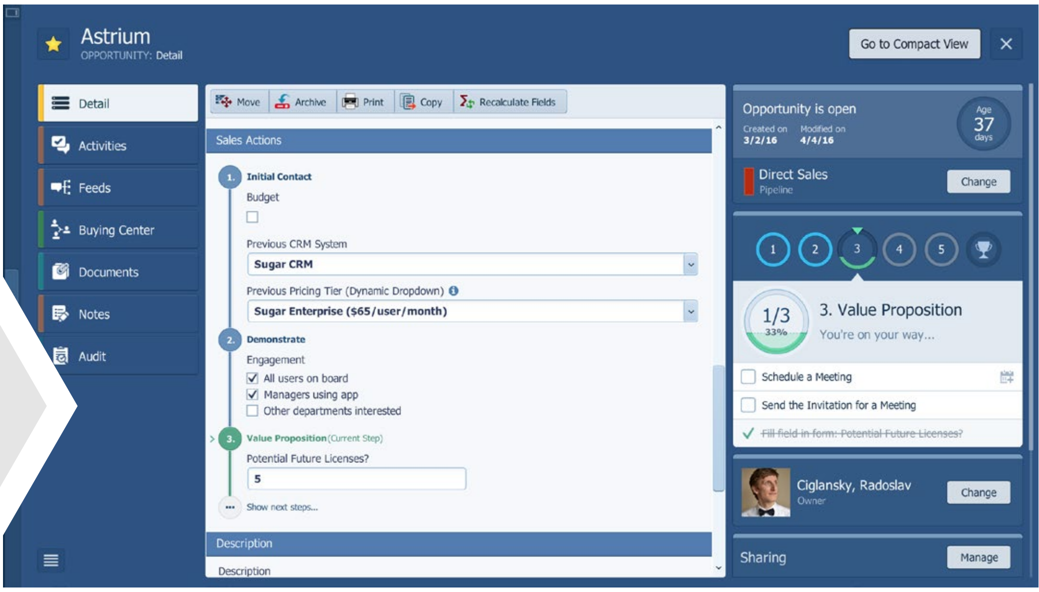


Sales Activities

Pipeliner's Sales Activities feature gives you the option to define what should be done in each step of your Sales Process.

Required Sales Activities

Sales Tasks and Activities can be made mandatory so that nothing is ever missed.



Social Selling Made Easy

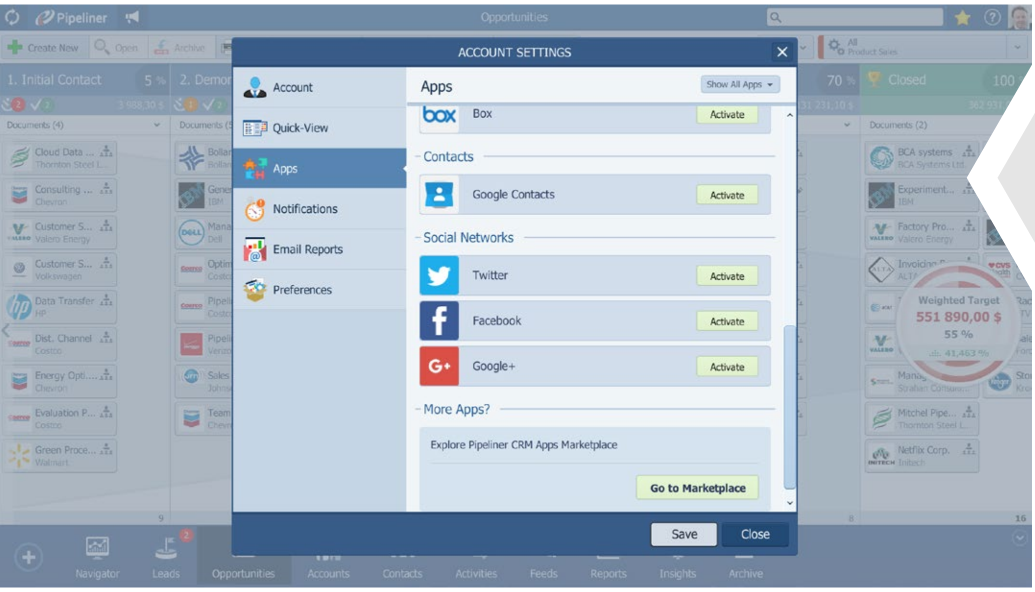
Today's buyer uses social media, **social networking and a host of other online sources as part of their buying process**, so it's important for your salespeople to be present everywhere your prospects are. With Pipeliner's **social feeds** you can stay up-to-date with what is happening with your customers and prospects. This allows you to react fast and engage with them in a knowledgeable and informed way.

This is made easy with our new **Contact Auto-Profiling**. With just an email address, Pipeliner goes out and searches for your Contact – adding picture, address, phone, social accounts, and more to the Contact Record. Less data entry for you.

Feeds

See Feeds from popular social networks (such as **Twitter, Facebook and Google+**) right on the Contact or Account record. When you interact with your prospect, Pipeliner keeps that history front and center in the Record, so you're always up to date and your team can see it, too.

- All feeds auto-refresh in real time.
- Take social actions directly from within the Contact Record, Account Record, Opportunities, and Leads.
- Shared connections give you a richer view of your network and how it fits together.

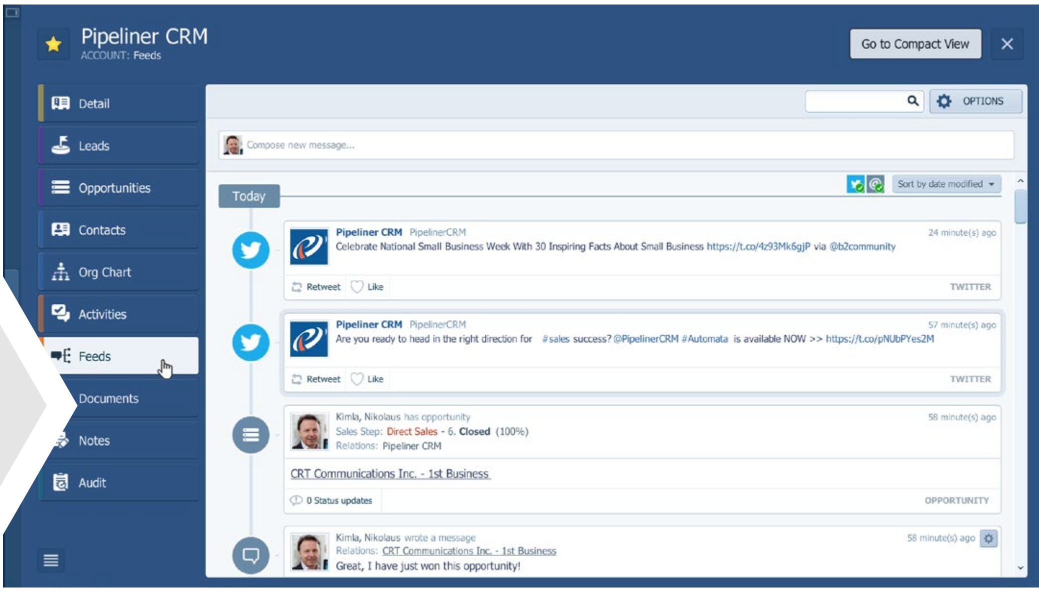


Social Media Accounts

You can easily connect customer contact social media accounts to Pipeliner in Account Settings.

Social Media Feeds

Follow Social Media feeds from right within Pipeliner, take actions and respond in real time.



Sales Reports: Meaningful, Powerful Insights—for Any User

As with many aspects of Pipeliner CRM, we designed reports in such a way that they could be created by anyone—no need to go through an admin or a specialist.

Sales managers can easily create their own reports and monitor their teams in real time. But reports are not just for sales management—salespeople can greatly benefit from having an easily accessible and customizable sales report at their disposal. This allows each salesperson to more efficiently manage their own pipelines.

Pipeliner CRM Reporting empowers you with:

- **1-Click Reporting** For nearly any view in Pipeliner, or for any filter you have set up, you can immediately generate an on-demand management report. It can be saved so that it can be referenced or recreated at any time.
- **24 Popular Preformatted Sales Reports** give you mix-and-match views to monitor up-to-the-minute sales performance. Detailed reports, in-depth comparisons, evaluations, and statistics are all user-managed.
- **Forecast Reports** provide powerful setting of quotas for all team members, and then tracking quota achievement in real time.
- **Visual Sales KPI reports** form a visual real-time view of sales at any given time. We deliver 27 popular, pre-built KPIs that you can use to immediately analyze business for a single rep, a sales unit or territory, or a whole sales team.

Additionally, all reports can be shared and exported across the organization.

Improved Data Reliability

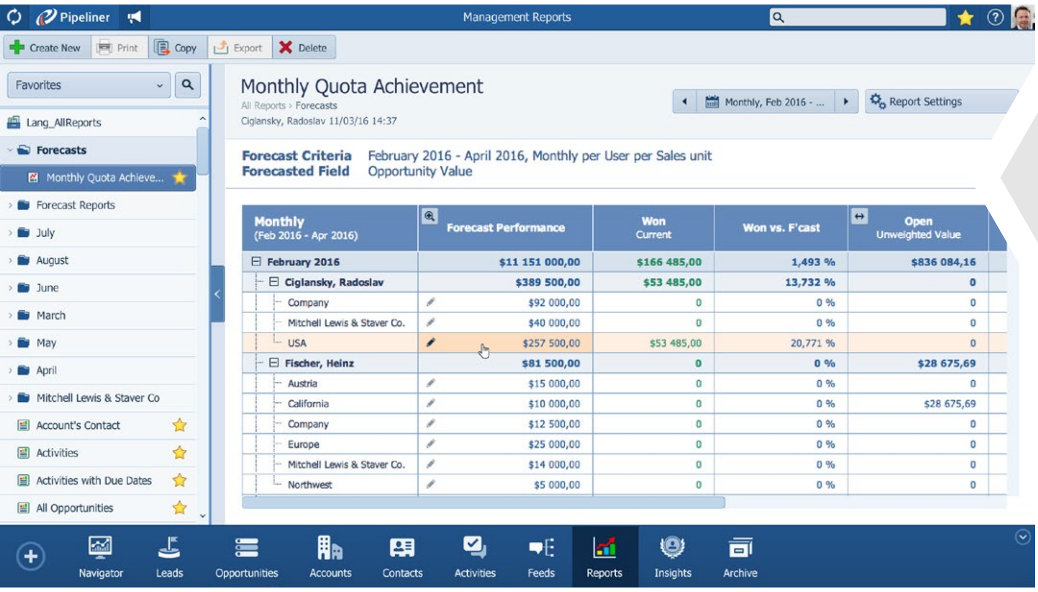
You can't have a sophisticated and informed overview without all necessary data entered into CRM. Here is where Pipeliner CRM Sales Activities can help ensure the quality of your reports - enabling you to set certain fields as required before moving an opportunity to the next stage.

This functionality (along with Custom Fields and Calculated Fields) can give you control over what data is being entered into your sales pipeline, ensuring that no important information gets lost and sales reports stay accurate and up to date.

The Powerful Pivot

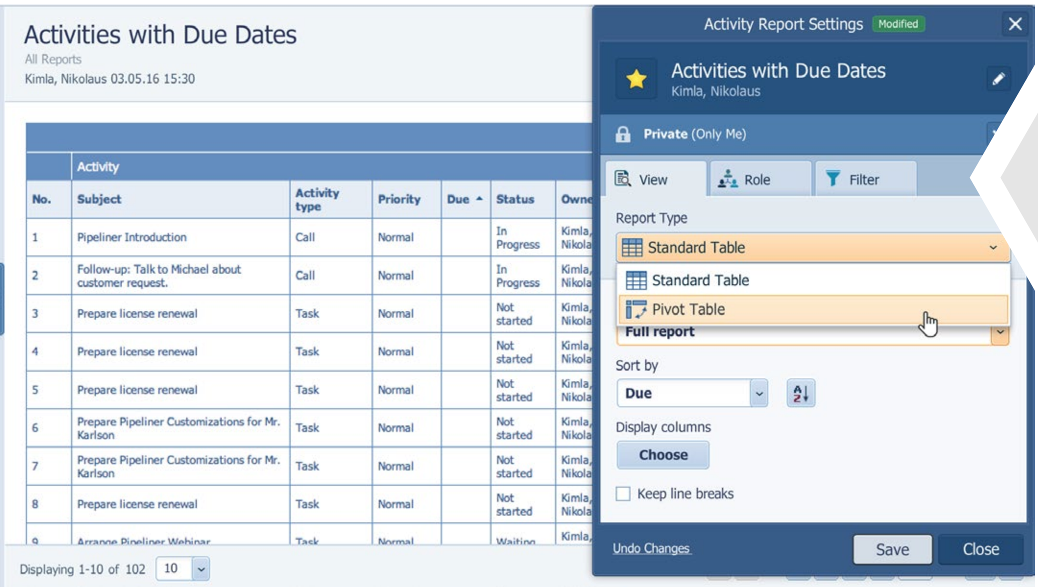
With Pipeliner's Pivot Table capability, you and your sales team can drill down into data and generate custom reports from multiple data sources. Pivot Tables are easily accessed and easy to configure, and the graphical interface enables you to create relevant reports in real time without leaving the screen.

Reports should inform and drive business actions and decision-making. Pipeliner CRM goes well beyond other tools available to make the most important insights accessible to everyone.



Sales Management Reports

Create, customize and share Sales Manegement Reports in PIpeliner with a few clicks. No admins needed.



Pivot Tables

Drill down into data, and generate custom sales Reports from multiple data sources with Pivot Tables.

Tracking Sales Efficiency: Pipeliner Hit Rate Manager

Among many other functions, a sales manager is charged with **tracking sales team efficiency**. There are obviously many different ways to do that—but you certainly need to understand the actions your salespeople are taking on a regular basis. For instance:

- How many calls are being made, and to what type of accounts?
- Are the right accounts being followed up?
- Are reps reaching out to both new and existing customers?
- How many tasks and activities are the team tackling?
- What kinds of actions are being performed, and are they being performed on the right kinds of leads and accounts?

Instead of hunting all over for this kind of data, Pipeliner CRM locates it all in one place for you.

Hit Rate Manager

From the Pipeliner CRM interface, simply select Reports › Hit Rate Manager from the bottom Tab Menu.

You can then narrow your scope with:

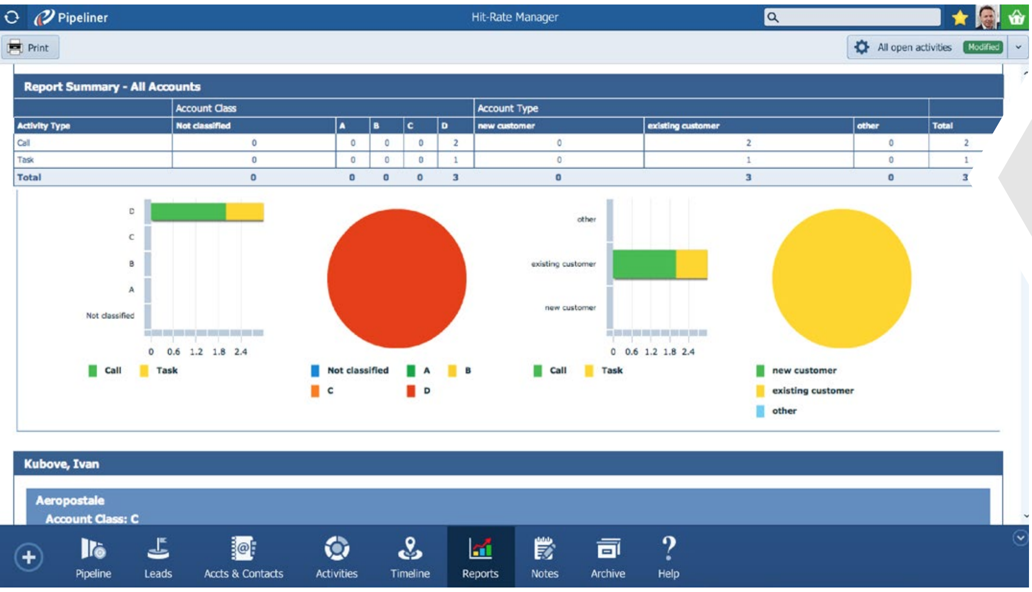
- **Type of account** (new or existing customers)
- **Class of account** (rated by your sales team)
- **Type of activity** (call, webinar, meeting, demo, etc.– as defined by your company and sales process)
- **Period** (from/to)
- **Sales unit**, entire team or even a single individual

Once these selections are made, your Hit Rate Manager Report is instantly created! It shows the number of actions made by activity type, on which type of account, for the time period specified.

Combine with Profiles

You can actually combine the Pipeliner CRM Profiles Feature with Hit Rate Manager for regular viewing of data you need:

1. Create a Profile, detailed to the View you regularly make
2. Run a Hit Rate Report for that profile, instantly, whenever you need it.



Hit-Rate Manager

Instantly track sales team efficiency with Pipeliner's Hit Rate Manager.

Online or Offline: Full CRM Functionality

Your buyers and competitors won't wait until your salespeople are online and neither should you. To maximize their chances of winning deals your salespeople need to be able to access and update your CRM at any time, whether or not an internet connection is present. With Pipeliner, the full CRM application is always available. Any changes made while offline are instantly and invisibly updated to the Cloud once internet connection is again established. At the same time, any changes that have been made to CRM elsewhere update on the salesperson's local machine.

The Smart cloud technology ensures:

- **Your data is always safe and 100% protected** – Pipeliner CRM is using state of the art cloud technology and services
- **Your data is accessible from everywhere** and with the highest possible download/upload speed possible provided by AWS (Amazon Web Services) - the leader in cloud technology

No Overwriting

Several users can be working on the same account at the same time, within Pipeliner CRM. When data is updated to the cloud, no information is overwritten. All data will always be available and up-to-date.

Synchronization

Pipeliner CRM synchronization is never a problem. It's blazingly fast, it's automatic, and you can always manually synchronize, if needed.

Data Security & Infrastructure

Data security is taken very seriously at Pipeliner. **You can expect secure communications between your Pipeliner application and the Cloud**. You can expect all the best of what AWS delivers:

- Superior data encryption policies for your data.
- Fast upload/download speeds across the globe.
- Enterprise-class uptime

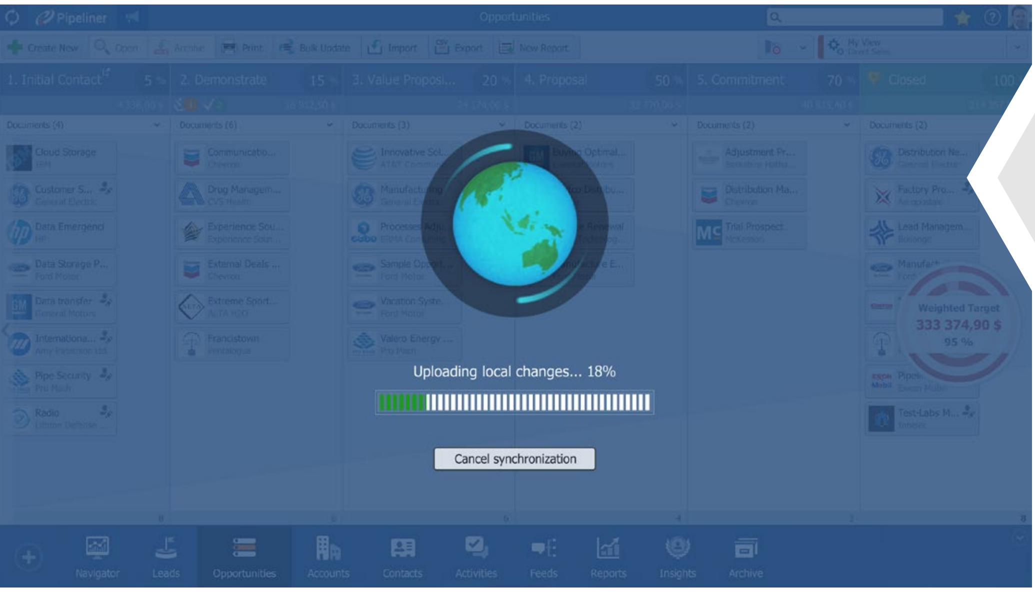
Green Technology—Sustainable Energy

Because Pipeliner's cloud services are hosted by AWS, we are also helping make a contribution to the environment.

For both environmental and economic reasons, a cloud service is hosting many companies, not just one, and is optimized so that servers in its data centers make maximum usage of hardware resources.

In addition to creating an extremely reliable and cost-effective cloud platform, **AWS has a long-term commitment to achieve 100% renewable energy sources** for their footprint. You can read more about AWS's sustainable energy initiatives here — bold strides such as the support of construction and operation of a 150 megawatt wind farm in Benton County, Indiana, called the Amazon Wind Farm (Fowler Ridge).

Along with Amazon, Pipeliner is committed to creating the most sustainable platforms possible, for our common future as a planet.



Synchronization

Synchronization between your desktop and the cloud is always smooth and fast, providing enterprise-class uptime.

Notes Management and Integration

A CRM solution can have all the functionality in the world—yet there will still be times a salesperson or other CRM user will need to **make specific notes about a conversation, an account, an opportunity or a contact.**

With traditional CRM applications this was often done outside of CRM – in Notepad or another kind of doc, or even on hard copy sticky notes. It was then saved elsewhere, and hopefully could be retrieved again or shared when needed. Of course it could also be totally lost.

But like most other issues with traditional CRM, Pipeliner has solved this one, too.

Notes Throughout CRM

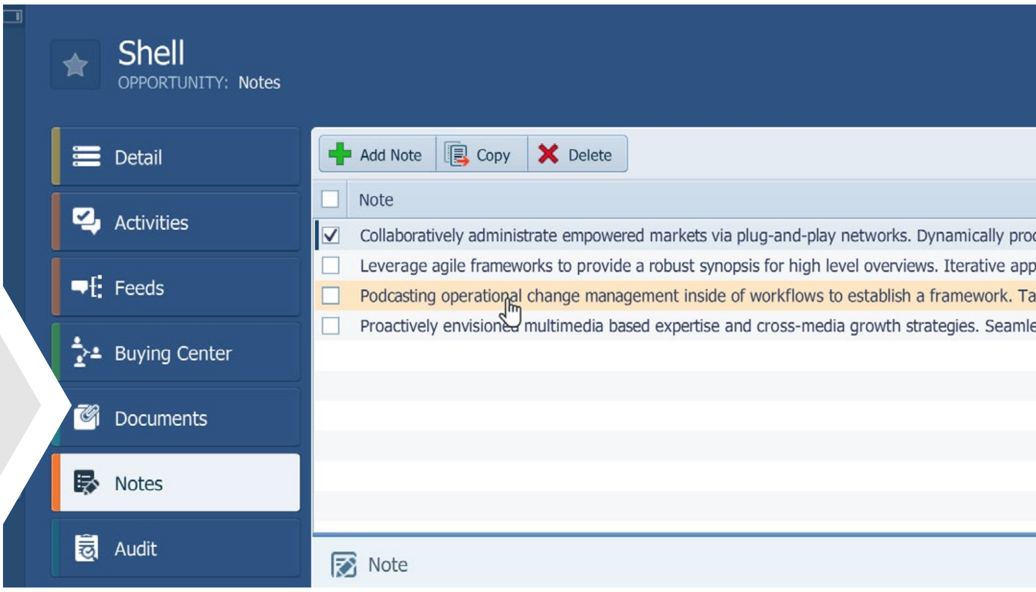
With Pipeliner, a user can create and save notes

- from within an **Opportunity**
- From within a **Lead**
- from within an **Account**
- from within a **Contact**

Notes can also be copied from one place to another, and shared with other users.

Pipeliner Notes Management

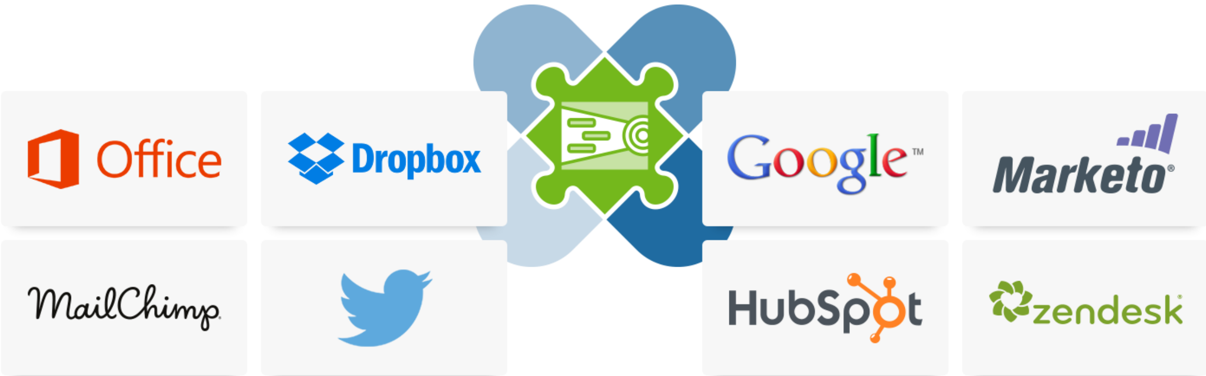
With Pipeliner, no information gets lost. You can access and create notes from multiple locations in the Pipeliner application.



Pipeliner App Integrations

Pipeliner has CRM integrations with 50+ popular apps, so you can work more efficiently.

We know that you use lots of apps in addition to your **CRM tool**. We've done our best to save you time, clicks, pesky scrolling, and the shock of noticing that you have 37 tabs open. We've accomplished this by making app integrations available right from within Pipeliner CRM!



That's right, from **A**ccountancy apps to **Z**endesk, and all points between:

Email, Calendar, Contacts and Tasks

We Work Well with Your Email and Files. We have deep email and Google CRM integrations with all the main mail services: Office, Outlook, Gmail, as well as GoogleDocs.

Accounting Apps

We show you the money. Manage invoicing and bookkeeping with apps like QuickBooks, Xero, and FreshBooks

Marketing Automation

Send Good-Looking Emails and Manage Marketing Campaigns. Use many of the most popular automated solutions for your email marketing outreach, synced up to your Pipeliner CRM system. For email campaigns, for instance, we support mailChimp, ExactTarget, Act-On, Marketo, Constant Contact, Vertical Response, Mad, Mimi, and more.

Data Import and Synchronization

What You Need, When You Need It. Have access to the best data and the best intelligence and accelerate your sales from within your CRM. Explore useful contact integrations with apps like Capture!, Import2, and Brandizi. Store your information safely on Dropbox, Box.com, and GoogleDrive — and access it from within Pipeliner CRM.

Support, Chat, and Helpdesk

It´s All About Your Customer, After All. Manage customer support, customer service, tech support and track them from within Pipeliner CRM with FreshDesk and ZenDesk. Manage chat functionality on your site with Olark.

Document Creation and Quote Management

Keep Your Assets Handy in the Sales Process with Document App Integrations. Connect documents and quotes to any stage of your deals in Pipeliner CRM with PandaDoc. Connect Dropbox, Box.com, and GoogleDocs to Pipeliner so everyone has the latest version and stays on the same page.

Social Media

The Tool for Relationship Management. Social CRM is now a best practice. Connect Pipeliner CRM to all the major social channels and track your social success with our Klout integration.

E-Commerce Integrations

Run Your Online Store, Efficiently. Manage the financial side of your online business and website with apps like Shopify, Chargify, and Magento, sharing data with your CRM — and vice versa.

Event Creation and Tracking

Keep Coordinated and Keep Organized. You and your team can coordinate your calendars, conduct GotoWebinars, and handle ticketing through Event-Brite to help you keep organized when events have to be perfect. It happens in your CRM.

Apps Integrations

Our CRM integration strategy is to work with partners who enable users to build custom workflows for business productivity. We feature an open API in C#, Java, PHP, Ruby Software Development Kits (SDK's), which can be accessed and integrated easily by other vendors (and app integrators).

We're alway open to the most popular app integrations — feel free to make a suggestion on our Feedback Forum! Check back often!

Email Integration

Pipeliner CRM includes full email integration—from within the application.

While the number of communication platforms and applications continues to mount daily, there is one which has been there since the beginning, and which will very likely always be with us: email.

In the past, email integration with CRM has often been problematic: Email might be integrated with your CRM application if the email client and your CRM were from the same vendor. Or some cross-platform integration might have been possible. Or, in many cases, there was no integration and the user always had to go outside CRM and handle email with its native email client only.

But with Pipeliner... virtually all email integration is possible, and email can be seen, responded to and stored from within CRM.

Email Feed

As part of your Pipeliner account, contact and opportunity views, there is a Feed section which displays communication from email, social media and notes from phone calls and meetings. Your Feed is your visual display of all communication taking place regarding that account, contact or opportunity.

When an email has been received, it will show up in Feeds so it can be seen.

Your Feed can be customized so that you only see the communication you really need to see.

From within the Feeds section you can also read and respond to email from any of your contacts—no need to leave CRM to view and handle email.

Email Notification

If someone writes you an in-app message (through the Pipeliner messaging system), you will receive an email notification that this has occurred. Email notification also occurs when anyone comments on a feed message, and also when an item is linked to the activities section of an opportunity or account.

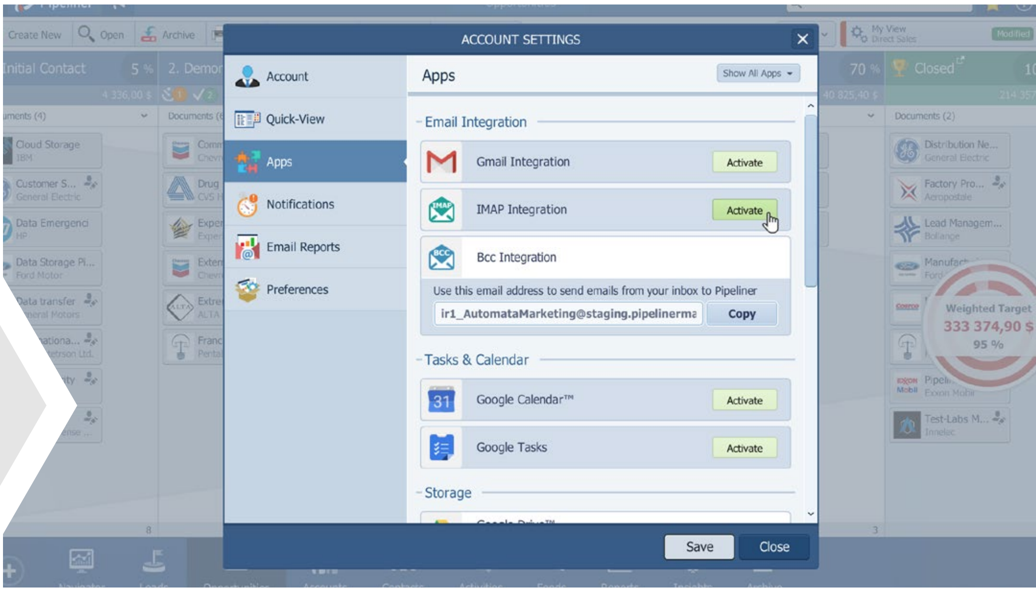
You will also receive periodic email notifications when Pipeliner has a new version, an update, or news.

Email Client Integration

Many companies and users have particular email clients they have always used and don't want to give up—the most common being MS Outlook and Gmail. Pipeliner fully integrates both of these, so that you can view and handle email for either of these email clients from right within Pipeliner.

Email Intergration

Pipeliner smoothly integrates with Outlook and Gmail, so you can work within your email platform and never have to switch back and forth between email and CRM.



Auto-Profiling: Saving Hours of Admin Work

When you are filling in data for an account, you often have lots to enter – **company**, **address**, **phone**, **social media data** (if available), and more.

What if you could enter a single piece of data—and the rest would be filled in automatically?

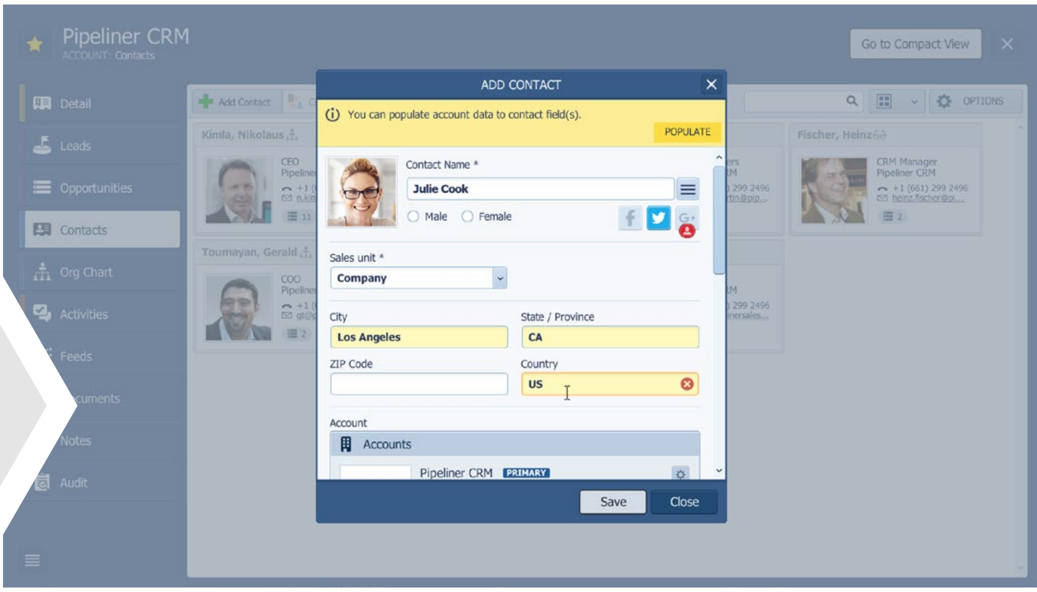
It's a high-tech age, and high-tech solutions are the order of the day. Introducing **Pipeliner CRM Auto-Profiling**!

When you enter an email address for a Contact, or a URL for any Account, we immediately begin to **search online for publicly available information** such as avatar, address, title, social media accounts, and more. Once this data has been verified with a high probability of an exact match, the data is automatically filled in for you!

Note: This feature is currently available by invitation. Please sign up here to take advantage of Pipeliner's new Auto-Profiling feature.

Autofill

Pipeliner automatically searches online for publicly available information such as avatar, address, title, social media accounts, and more.



History Log: Tracking Changed Data in CRM

From an administrative or supervisory standpoint, it can be important to view **any changes made to the CRM system**, including **who made them and when**. You need this data when:

- you see a **pattern of opportunities being moved too soon**
- you see a **high amount of incorrect data** is being entered
- you suspect that **someone (who should not be making changes) is making changes**

Some CRM applications have no easy way of tracking such changes—but like everything else, Pipeliner has made the solution simple and visual.

Pipeliner CRM History Log

The Pipeliner CRM History Log (Audit) can be accessed two different ways.

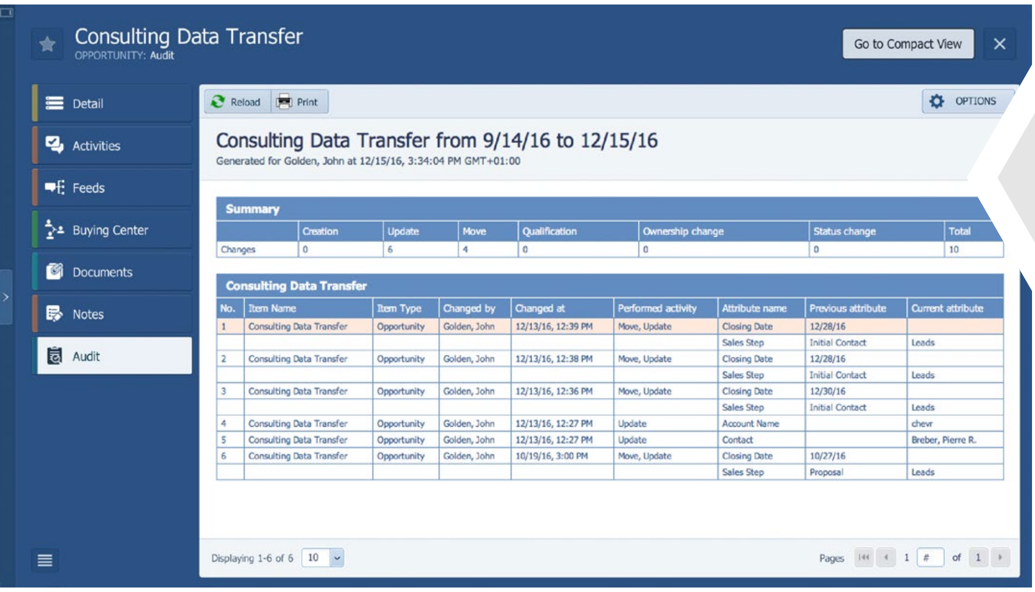
- **From any Lead, Opportunity, Contact, or Account** – simply select Audit and see who has recently made changes.
- **From the Pipeline View**, go to the Reports tab and select Audit to view a full Report of recent changes made in CRM.

The History Log shows you changes in:

- Ownership
- Creation
- Update
- Qualification
- Movement
- Status

Additionally you can focus in on changes by

- Specific time period
- Specific user

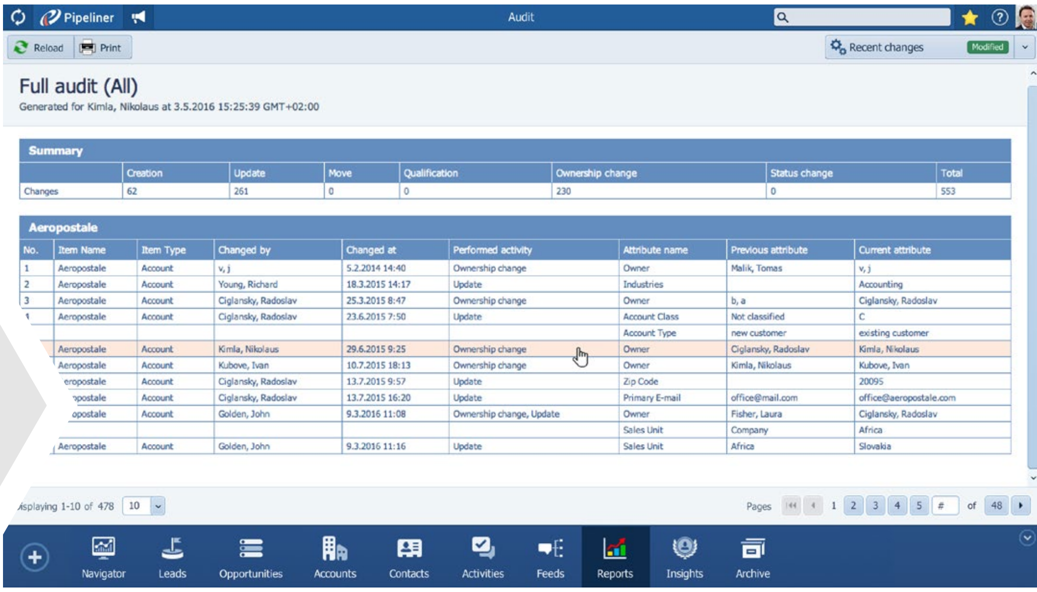


Opportunity History Log

Track any changes made within a particular opportunity.

Full Audit

History Log (Audit) allows you to track any changes made in CRM at any time.



Geolocation: Always know where your sales are happening

We know that sales isn't all about sitting at your desk. You need to get out there—meet people, make site visits, conduct presentations and demonstrations.

When you go to visit a client or prospect, you will of course need to know how to get there. So that you don't have to go outside Pipeliner, we've developed our Geolocation feature for both the mobile and desktop versions of Pipeliner CRM.

When Traveling

When an account or contact's physical address have been entered in Pipeliner's account or contact form, their address will automatically be mapped in the mobile version—in other words, right there on your mobile device. Look no further.

This is especially useful when visiting a city you're not familiar with. Geolocation will show you your prospect's or customer's location in relationship to your current location, including distance.

From Your Desktop

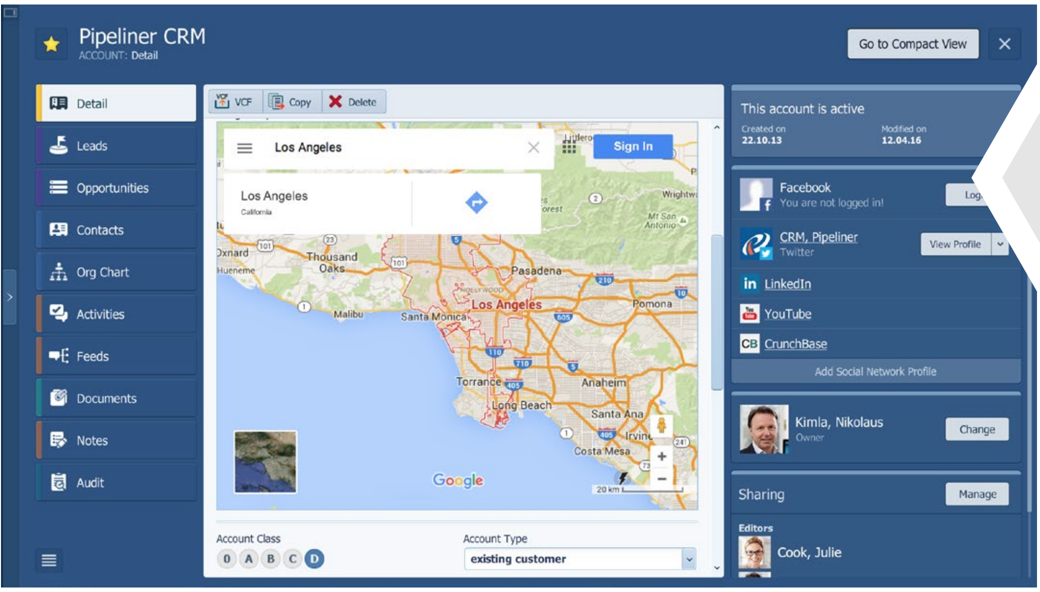
Even when you're at your desk, you'll want to know where your prospects and customers are located.

Our desktop CRM version includes Google Maps Integration, utilizing street address, city, and country field information to display locations within maps.

To fully take advantage of this feature, you will need a Google account. The Google account is free and has numerous advantages including Google Maps Pipeliner CRM integration, so we highly recommend you obtain an account if you haven't already done so.

With Pipeliner CRM Google Maps Integration you can:

- view a single account/contact record on the map. On your Pipeliner CRM Mobile CRM, you can view the map location of your account/contact and include the distance.
- using the options settings, narrow down the records you would like to view on the map. Once the map is open you can review the information about the selected contacts/accounts on the map.
- configure a custom field to display Google Maps within account or contact forms.



GEO Location

On your Pipeliner CRM Mobile CRM, you can view the map location of your account/contact and include the distance. Configure a custom field to display Google Maps within account or contact forms.

STAGE 3

CONVINCE

As we saw in the ebook *Reducing Risk*, at the third stage of the Pipeliner Selling System, *Convince*, you are convincing the buyer—and all decision-makers and influencers at the company acting as evaluators—that purchasing your product or service is absolutely the right thing to do. It's all about demonstrating to the prospect that you have totally understood their business issues and the buying criteria involved. and that you're meeting their particular needs.

At this point in the buyer's journey, the buyer has become an *Evaluator*. They are now looking over your product or service carefully, and comparing it to company issues.

It is at this stage that the sale is made.

Pipeliner Principle

There are two principles from the *6 Fundamental Principles Found in Pipeliner CRM* (from the ebook *Reducing Risk*, link above) that apply to the Convince stage:

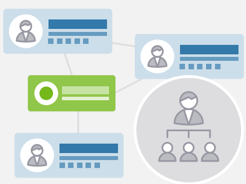
- **Utilizing Strengths**, because you are making the most of the strengths of your product or service in convincing your prospect.
- **Concentration on a Few Things**, because you are keeping your prospect's attention on the most important elements of your product, and how they directly connect to and solve the prospect's issues.

Under the heading of *Convince* are the Pipeliner CRM features contained in this chapter:

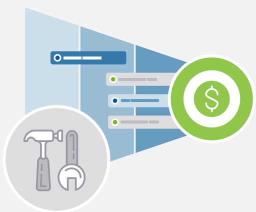
THE PIPELINER TASK BOARD:
A NEW WAY TO WORK

DYNAMIC TARGET:
CONSTANT FOCUS

PERFORMANCE INSIGHTS



SMART ORG CHART &
BUYING CENTER



FILTERS: ZEROING IN ON
DEALS THAT COUNT

GETTING A HANDLE ON
SALES VELOCITY

SALES KPI DASHBOARD
—INSIGHTS ON DEMAND

CUSTOMIZED
AUTO-CALCULATIONS

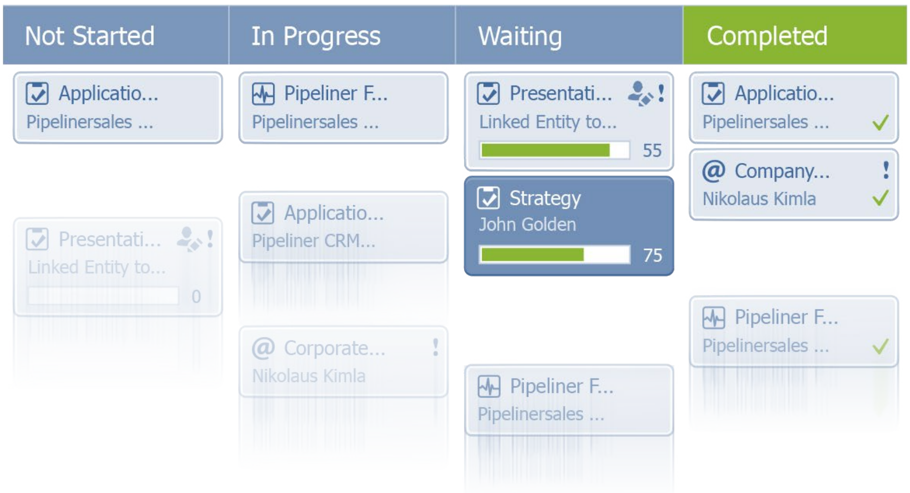
SALES DOCUMENT
MANAGEMENT

The Pipeliner Task Board: A New Way to Work

Every sales rep is inundated with dozens of tasks in various states of completion: research to do, calls to make, meetings to attend, and a host of other activities. It is very challenging for the sales rep (or their sales manager!) to keep track of it all.

Pipeliner solves this challenge with a new, drag & drop Task Board that keeps sales task management organized in neat, visual columns.

Each of the columns below show task status (these of course can be customized to suit your needs):



Tasks

Sales tasks are the many activities that make up a sales cycle. Some of these are direct interactions with the buyer, such as calls, meetings, and product demos while others are internal such as company and prospect research, proposal writing, and internal communications of status. Consistently executing each task in an efficient and timely manner is how high-performing sales reps and sales teams operate. Pipeliner now makes it easy for your sales team to operate in this way.

Every task can have a priority, a status, a due date, an owner, and include "watchers" who need to be aware of the progress of that task. No more manual updating of status internally!

- **The Task Board is drag and drop**, left to right, just like your pipeline – a visual representation of your entire team's key activities.
- **Drag and drop multiple tasks at a time** – making managing your key activities fast and efficient.
- **Immediately See Due Dates**. At a glance, track what's fallen behind, what's coming up next, and when a task is completed.
- **Tasks are linked automatically to a specific Opportunity**, meaning that you can click into them and go back to the root Opportunity at any time. The same concept applies when you go to Accounts and Contacts and create a New Activity – that Activity is directly connected to that Account.

Activities

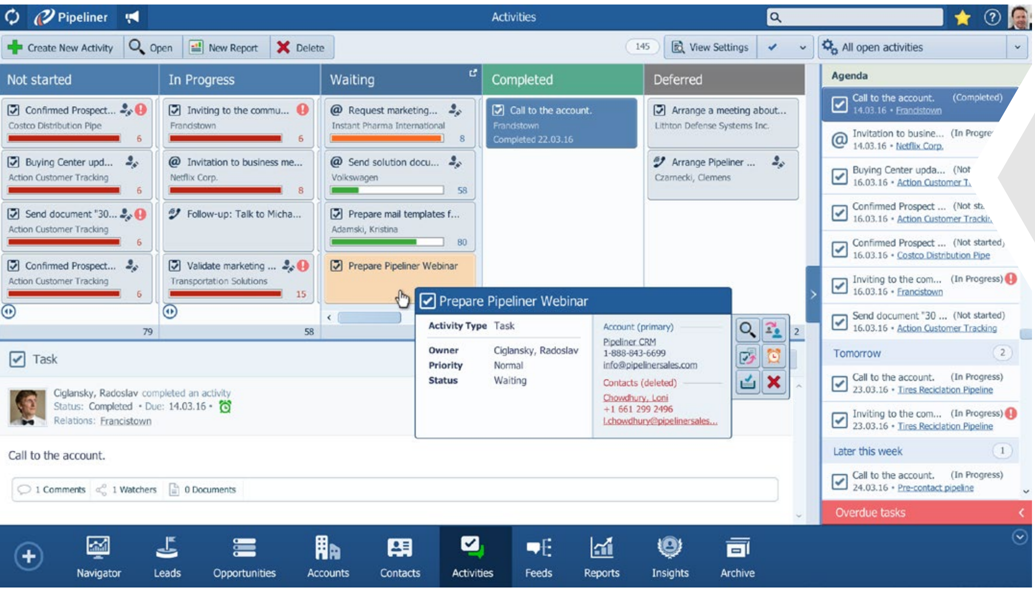
Activities can contain Tasks, Appointments and Calls. Pipeliner supports both Calendar and Grid views for these different functions.

- Activities are easily accessible from within the Opportunity Control Panel.
    1. **Capture, enhance, manage, and share Activities** with your team. See not only the Task you just created – but also all the Tasks and Activities connected to that Opportunity from your entire team!
    2. **Track Activities** by subject, priority, due date, and more.
    3. **Easily create Follow-Up Activities** for Tasks and Meetings
- Custom **Views** and **Filters** mean you choose what to focus on. You see the tasks you need to focus on, immediately.

You can see your team's internal communications across every Opportunity, Account or Contact. This makes for effective communication between sales team members and management. This is sales process management made easy!

Automatic Task Creation

Pipeliner saves you even more time with tasks automatically created as you move an opportunity into the next sales pipeline stage. When an opportunity is moved to a new stage, a pre-defined list of tasks is suggested to the user. The user can accept, edit or reject the tasks.

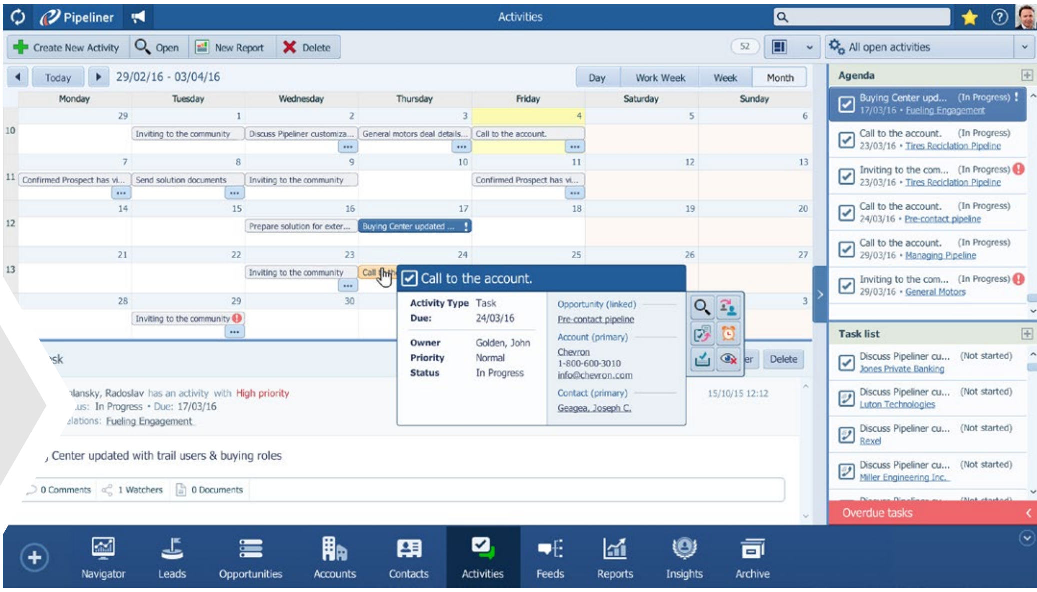


Task Management Board

Drag and drop your tasks, and track your workload visually.

Task Management Calendar View

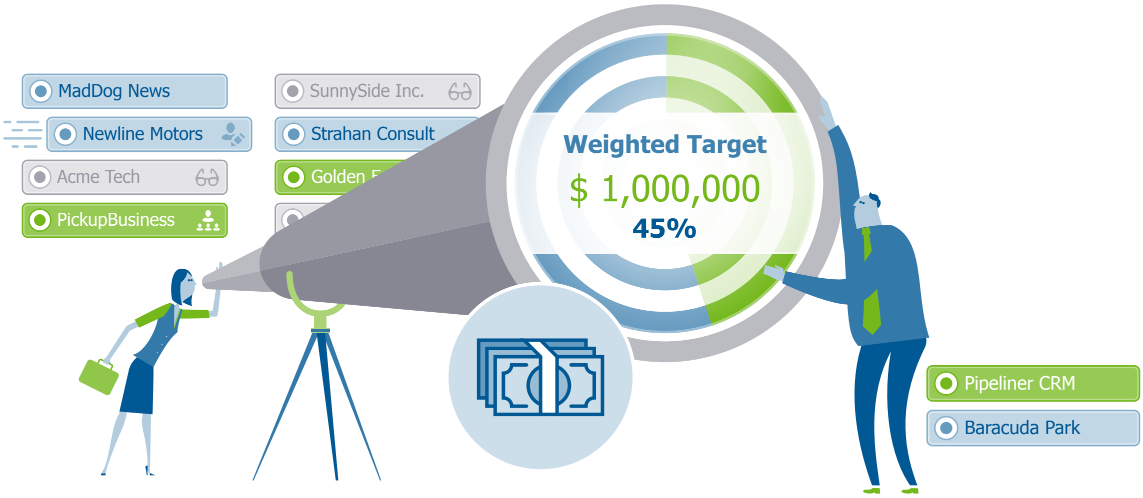
Calendar View gives you a day-to-day overview of all that needs to be done.



Dynamic Target: Constant Focus

The Pipeliner CRM Target is one of its most important features. Always visible to the right of the main Pipeline View, the Target constantly reflects the overall result being focused on by the sales force.

Because it is constantly visible, the Target feature keeps the goal front-of-mind for any salesperson. It is always a conscious or even unconscious motivation for the rep to make that quota.



In Pipeliner, 5 different Target views are available, accessed through a drop-down menu simply by clicking to the upper left of the target itself:

- **Unweighted Sales Target:** The value of all Opportunities in a Pipeline without any closing probability percentages. This can be useful if you have some historical data that says, for example, that a rep closes 10% of all Opportunities. You would look for the Unweighted Sales Target to be at least 10x the goal.
- **Weighted Sales Target:** The Weighted Target is equal to the sum of the total Opportunity values in each Sales Stage, multiplied by the probability of closure for that sales process Stage.

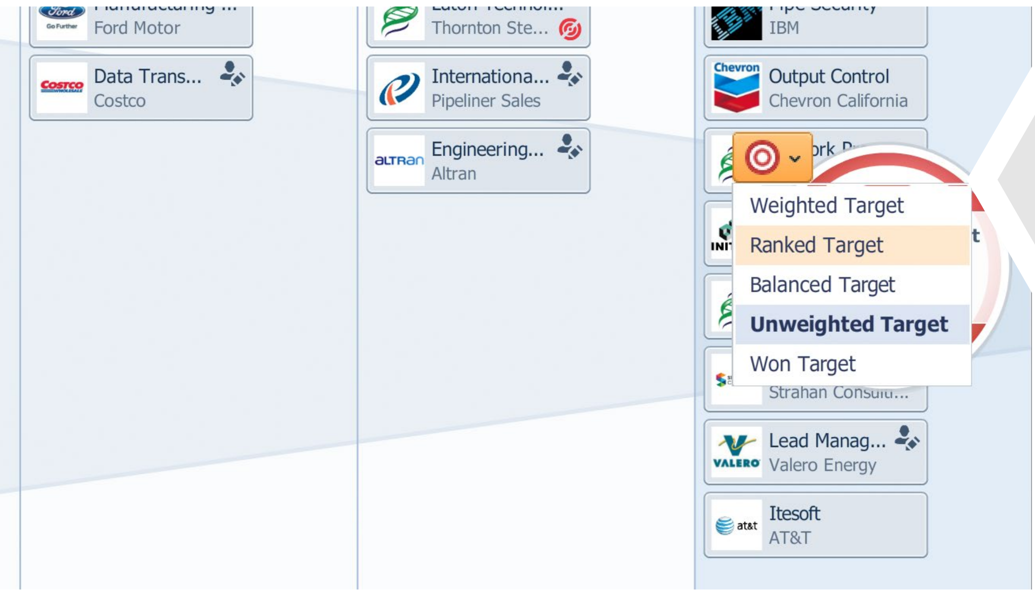
- **Ranked Target:** Each rep has the ability to apply a personal ranking to each of their Opportunities, from one to five stars. The Ranked Target shows their level of confidence in their Opportunities.
- **Balanced Target:** The Balanced Target can be looked at as a worse case scenario, because it balances the Weighted Pipeline and the Ranked Pipeline.
- **Real Target:** The Real Target represents the actual closed or won Opportunities.

Eliminate Specific Opportunities

A sales rep or sales manager can set up and examine scenarios for the Target by eliminating specific Opportunities from the Target value. Simply hover over an Opportunity and click on the "Target" icon to toggle it in or out of the Target total.

Multiple Values in Dynamic Target

You can utilize multiple KPIs (Key Performance Indicators) in the target view. You can compare 2 different indicators, such as Opportunity Value and Number of Opportunities, or in fact any numeric calculations you wish. You can also compare 2 different timeframes for deeper analysis.



Sales Target Options

In Pipeliner, 5 different Target views are available, accessed through a drop-down menu simply by clicking to the upper left of the target itself.

Performance Insights

With its new, breakthrough Performance Insights feature, Pipeliner brings its powerful visual, intuitive functionality to sales performance management.

Satisfying a Crucial Need

Since the beginning, efficient sales performance management has been a primary purpose of CRM. Likewise, individual team members have desired the ability to evaluate their own performance.

Unfortunately, such functionality in traditional CRM solutions has proven overly complex and unwieldy. It failed to provide a clear, rapid view into overall sales team or individual sales rep performance, or comparisons among team members.

As with many aspects of CRM, Pipeliner has greatly simplified and yet made far more powerful this aspect of sales management.

The Difference

Now, instead of spending hours searching all over through spreadsheets or through various aspects of a traditional CRM solution, just to perform an analysis of rep or team performance, it’s as simple as a few mouse clicks into Pipeliner’s Performance Insights feature. Discover how reps or teams compare to one another, who is doing well and who perhaps needs coaching or mentoring.

Performance Insight Instant Views

TEAMS

When leading a sales team, gaining insights into sales performance is a snap:

- A selection of pre-defined Key Performance Indicators (KPIs) is available for use
- Zero in: Utilize “Click-to-Detail” functionality to focus in on a specific user and related KPIs
- Toggle between user view (to compare users) and sales unit view (to compare sales units, teams or territories)
- View the historical trend of a team
- Click on the Process Overview tab to see conversions of leads and opportunities, per rep

INDIVIDUALS

Performance insights is equally as valuable to the individual user:

- Select one or more pre-defined KPIs
- View “overview” stats for the individual, such as closed deals, revenue, or created leads
- View the historical trend of a user
- Click on the Process Overview tab to see conversions of leads and opportunities

Drill Down

For any Performance Insights score, you can drill down to see exactly which variables and values are included.

Smart Org Chart & Buying Center

Your Instant Visual Relationship Map

In B2B selling, you're rarely selling to one person. You're **selling to a group of decision-makers** who hold different positions in the company, and who have different levels of influence on the purchase.

In addition to the basic hierarchy—which is obviously important—**different individuals may have substantial influence on the purchase** despite higher or lower positions in the company. There may also be others outside the company, such as consultants, who are influencing the purchase as well.

It's vitally important to keep track of both the hierarchy and lines of influence participating in a purchase. Other than keeping detailed notes, though, how is this done?

Fortunately Pipeliner CRM's totally visual **Smart Org Chart and Buying Center** make this task incredibly easy.

Hierarchy at a Glance

The **Smart Org Chart** allows you to instantly drag-and-drop all of your entered contacts for a company into a chart **showing company hierarchy and who reports to whom**. This allows the sales rep to always know to whom they're talking, where they stand within the order of things, and who must still be convinced in order to bring the sale to a close.

Buying Center—Instant View of Influence

Instantly **import your Contacts from the Smart Org Chart into the Buying Center**, and arrange them so that you can see who is influencing the purchase, and from where. You can also add in other Contacts—such as consultants or others the buyer listens to—that may not show up in the company hierarchy.

You now have instant visual relationship maps of both hierarchy and buying influence within your prospect company.

Never Cast in Stone

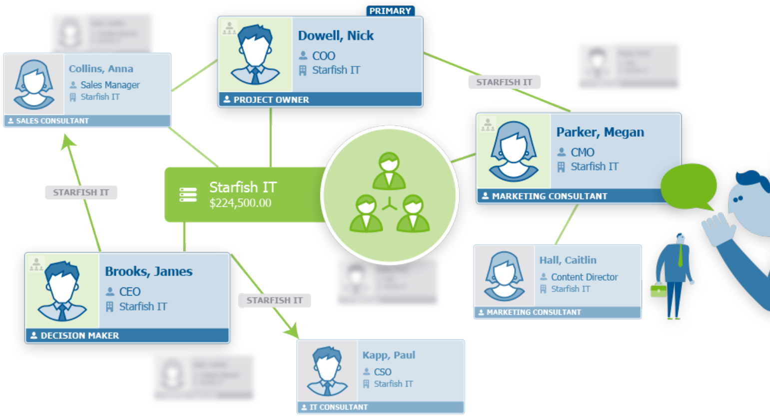
Companies are dynamic entities—they are always changing. People can change jobs, move out, be replaced by new employees. Your Org Chart and Buying Center can always be kept current—changing data within them is as easy as importing and positioning data in the first place.

Knowledge is Power

Having this information at a glance means that anyone in the sales organization—or even outside, such as Tech Support—will always have a firm grasp on the prospect company. It's always true that the better your knowledge of your prospect, the higher the probability of a close.

Associating and Consolidating Multiple Accounts

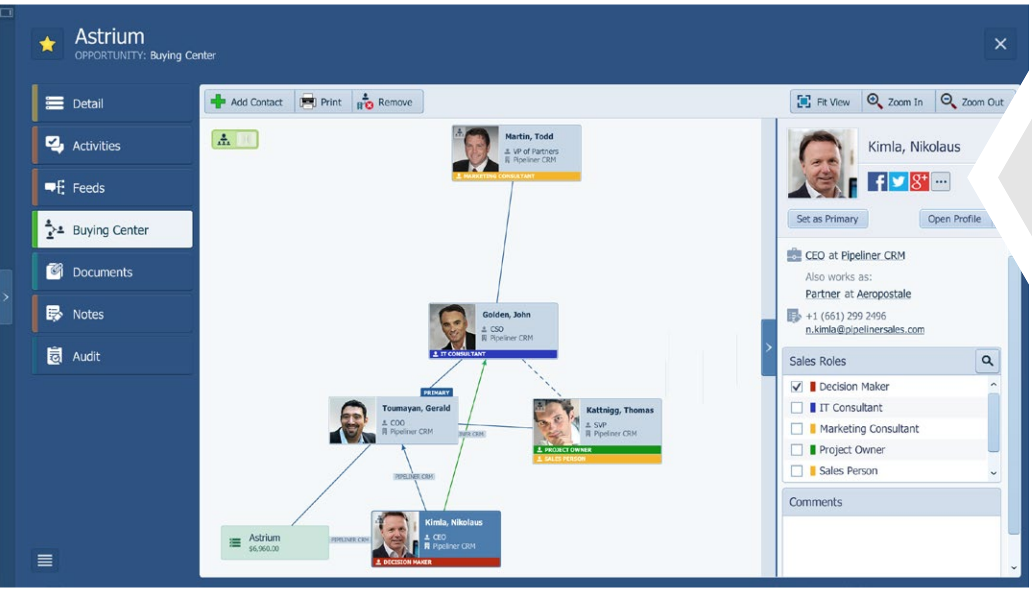
Today it can happen that several accounts are related to each other. As an example, XYZ Company might own ABC Company, and it might even be that XYZ company must ultimately approve any purchases being made by ABC company. But in Pipeliner these 2 companies are entered separately because they're actually different entities.



A sales rep on ABC's account, though, might want to associate the 2 companies because they are, in fact, related. With our new Parent Account feature, this can now be done: you can assign a parent account to an existing account—in our example, XYZ Company could be assigned as a parent account to ABC Company. This new feature also allows the assignment of multiple accounts under one account.

You can also select a particular account, and aggregate data from multiple accounts into that selected account.

Our Smart Org Chart and Buying Center functionality has now been updated to support multiple accounts.

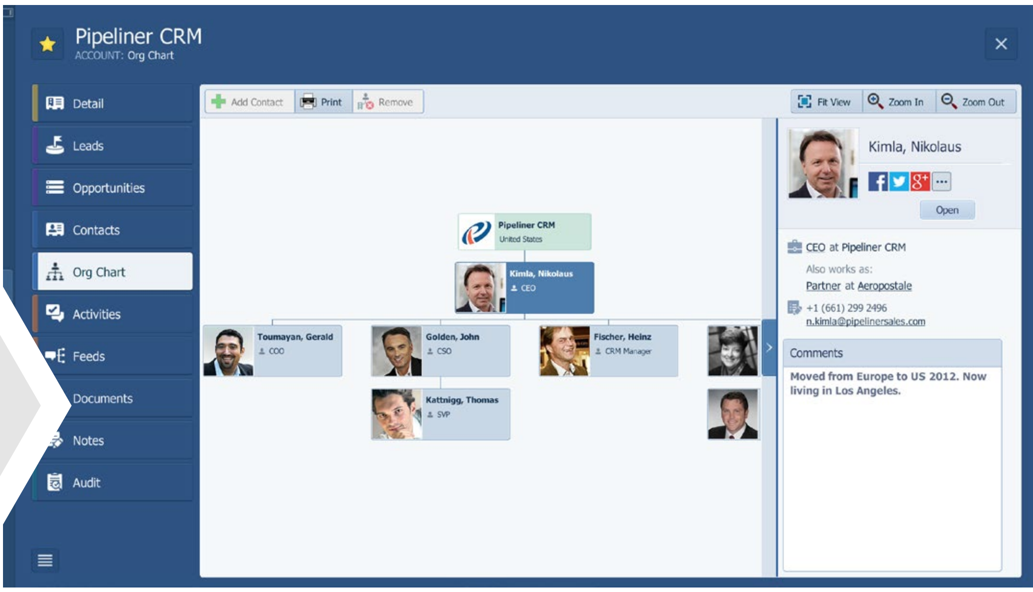


Buying Center

The buying center is your instant relationship map for every account and opportunity.

Smart Org Chart

Visually map out your customer company's hierarchy to always understand who you're dealing with.



Filters: Zeroing In on Deals That Count

As shown in the earlier chapter on *Focus* features, Pipeliner's Pipeline View is the visual key to your processes. But from the Pipeline View, you can also gain endless perspectives on your sales pipeline—with Pipeliner Filters.

Filter settings are found by clicking on the cogwheel icon in the upper right of Pipeliner, then clicking on "Filter Settings." You can filter by:

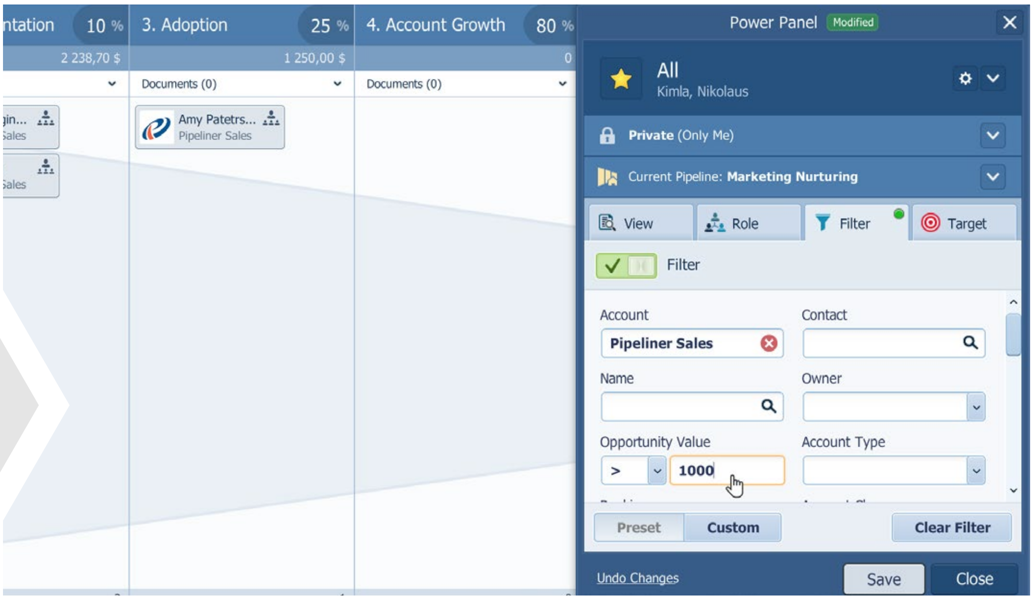
- Account
- Contact
- Name
- Owner
- Opportunity value
- Account type
- Ranking
- Account class
- Time in sales step
- Due in sales step
- Sales unit or subunit
- Products
- Sales step

An example of using filters is to filter by deal size ("Opportunity Value"). You could, for example, simply look at deals over $10,000 to get the view of the number and value of big deals in the pipeline.

There is a wide variety of ways filters can be used for focusing and prioritizing, as you will no doubt discover.

Filter

You can easily and quickly focus on specific groupings of opportunities, based upon criteria entered into the Filter.



Getting a Handle on Sales Velocity

How much has velocity to do with sales? Everything.

- In order to be profitable, a sale must move through the sales process in a timely manner; salespeople and sales managers acknowledge that the **likelihood of closing decreases the longer a sale remains in the Pipeline**.
- In order to keep a clear view of your Opportunities, you must know how long they are taking to close.
- Sales that hang fire must be isolated so they can be addressed or moved out of the active Pipeline.
- In order to keep a firm handle on your sales process, you need to know how long **each sale is taking in each Sales Stage**.

Working it All Out

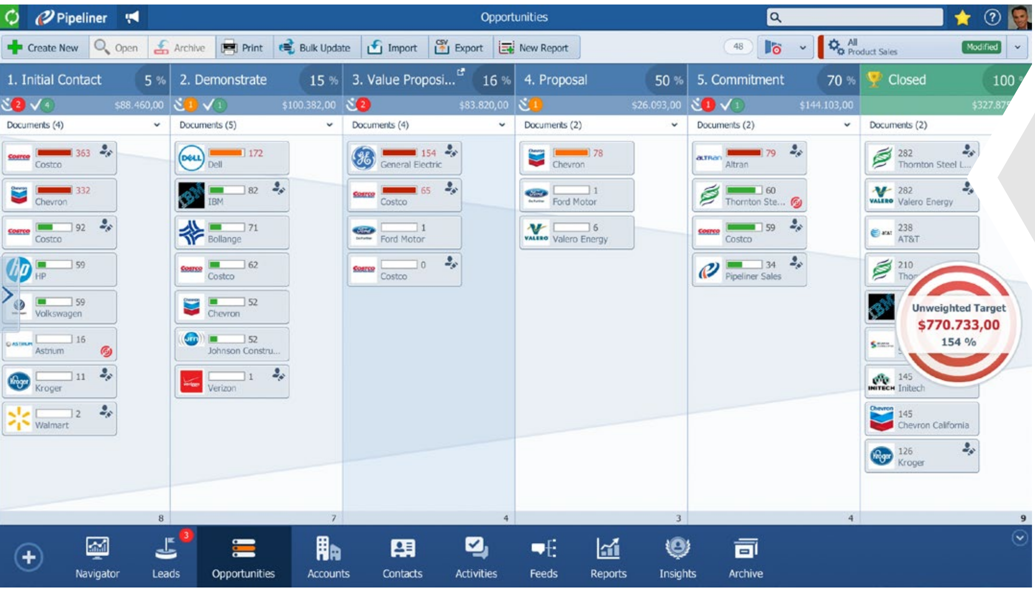
You can work out (from experience of your best salespeople, and from statistics) how long a sale should take to close, and how long it should take to move through each Stage of the Sales Process.

But you can only get a clear, visual view on sales Velocity with the **Pipeliner CRM Velocity Feature**. With this feature you can:

- **Set the timeframe for each Pipeline stage** – and adjust it as required over time
- See immediately from the Pipeline view how many sales in each Stage are overdue—giving you a clear snapshot of your overall Pipeline Velocity
- See how much time is left for each Opportunity in that Stage, or how overdue it is
- Focus on each Opportunity as needed to evaluate and take action – the most important aspect of Velocity evaluation

- Set warning notifications so that you are alerted to potential delays – allowing you to take action before delays become problems
- Instantly run **Reports based on Velocity** to gain different perspectives as needed

Every company needs to have a crystal clear visual view into the Velocity of Leads and Opportunities. Pipeliner is the only CRM solution that provides this feature.

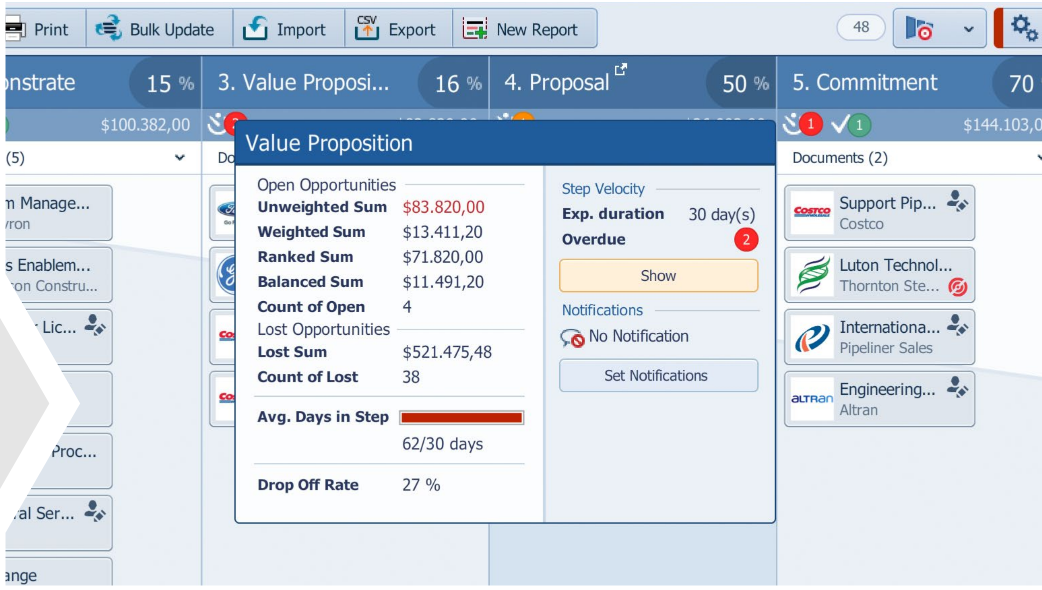


Sales Velocity

Instantly and visually see how many sales in each Stage are overdue—giving you a clear snapshot of your overall Pipeline Velocity.

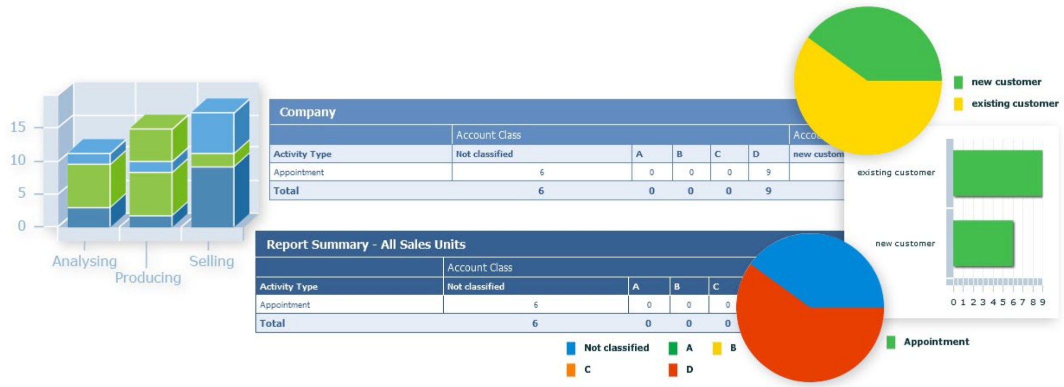
Sales Step Velocity

Set timeframes for how long an opportunity should spend in each step of your Sales Process.



Sales KPI Dashboard—Insights On Demand

Pipeliner Sales KPIs (Key Performance Indicators) Dashboard is built so that everyone on the sales team can easily see and interpret the data to make better, more informed decisions.



Visual Insights Mean Everything

Part of being able to deal with the complexity of B2B sales—on both the sales and the buyer sides—is the use of reports to better chart your way. Pipeliner makes these insights visual, and yet another example is our KPIs feature.

Data is only useful if you can easily access it, interpret it—and then use it to make better decisions. In Pipeliner we deliver visual KPIs to do exactly that.

We deliver 27 popular, pre-built KPIs that you can use to immediately analyze business for a single rep, a sales unit or territory, or a whole sales team. These include:

- Win Rate by Opportunity Value
- Lost Reasons
- Pipeline Velocity
- Pipeline Overview
- Pipeline Conversion Rates Chart
- Pipeline Drop-Off Rates

- Won vs. Goal
- Lost vs. Goal
- Count of Overdue Opportunities
- Total Won Opportunities
- Total Lost Opportunities
- Top Accounts by Won Opportunities
- Top Accounts by Lost Opportunities
- Top Accounts by Open Opportunities

Totally Customizable

As with many other Pipeliner features, your KPI view is totally customizable. Pick any report and immediately add it to your view. They're always right before you when you need them.

Also applicable within the KPI settings are Pipeliner's powerful Profile features—allowing you multiple lenses through which to view your KPIs, and diverse targets for measuring with KPIs. View an individual, a sales unit, or an entire sales team, and utilize differing filters with which to slice and dice the data.

Visual Sales Dashboard

Pipeliner Dashboard gives you quick, visual and accurate insight into your Sales Pipeline.

Customized Auto-Calculations

Time is money – time saved in administrative functions **means money earned**. In addition to all other major functionality, this is also true of fields used within your CRM – each company is going to have its own requirements.

For example:

- Every company has its **own commission structure and calculation**
- A sales organization might want profitability shown with each opportunity
- A company might want to have a field that automatically figures in special discounts for pricing, for certain customers

Auto-Calculated (User-Defined) Fields

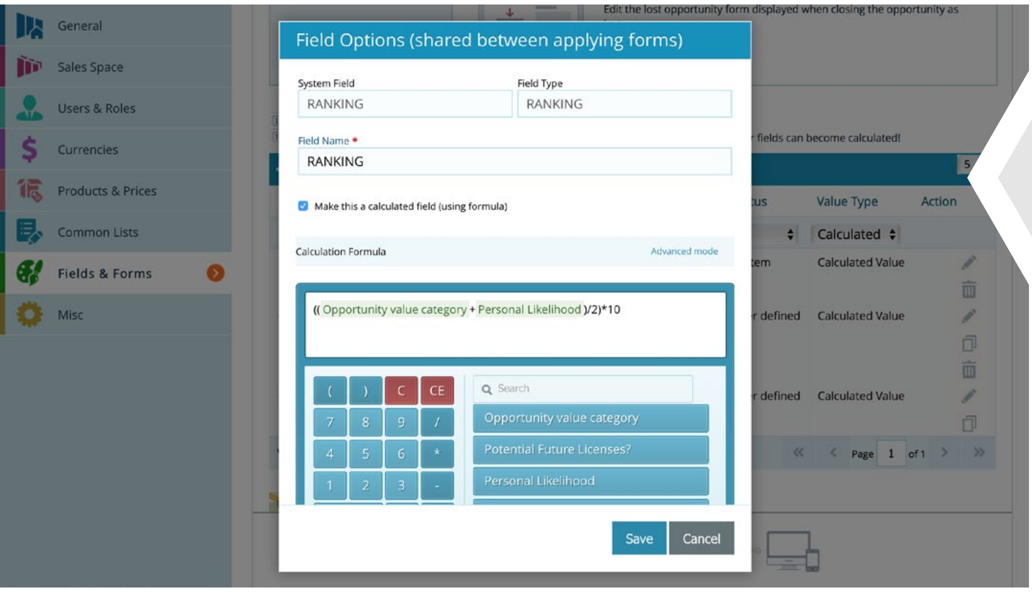
In Pipeliner CRM we have made Auto-Calculated (user-defined) Fields a matter of a few clicks, for any user. Auto-Calculated Fields are available for:

- Leads
- Opportunities
- Contacts
- Accounts

An Auto-Calculated Field can be as simple as **creating a mathematical function between two fields**. For example:

- A "commission" Field could consist of opportunity value multiplied by commission percentage.
- A "profitability" Field could be created by subtracting "opportunity cost" from "opportunity value."

Pipeliner CRM Auto-Calculated Fields have endless uses, and can save valuable sales hours having to perform manual calculations outside the application.

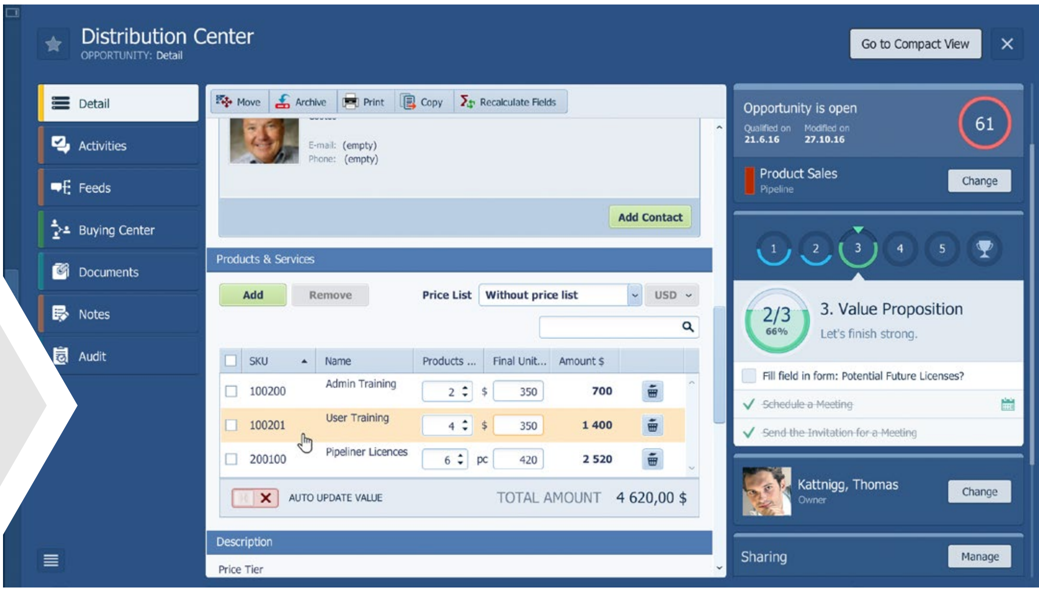


Auto-Calculated Fields

In Pipeliner CRM we have made Auto-Calculated (user-defined) Fields a matter of a few clicks, for any user.

Dynamic Price Calculation

Pipeliner CRM Auto-Calculated Fields have endless uses, and can save valuable sales hours having to perform manual calculations outside the application.



Sales Document Management

Important Documents at Each Sales Stage

Salespeople often need documents at each Stage of the Sales Process, as an Opportunity advances. For example:

- Contracts
- Terms & Conditions
- Marketing Collateral
- Competitor Comparison Sheets
- Industry Benchmarks
- Product Specifications

The normal method of managing these documents is to store them on a default drive so that they can accessed and sent to leads, prospects and customers as needed.

But this takes time. The salesperson or sales admin locates the documents before linking to them or attaching them to an email. With today's level of technology, there should be a much faster way of managing documents for sales.

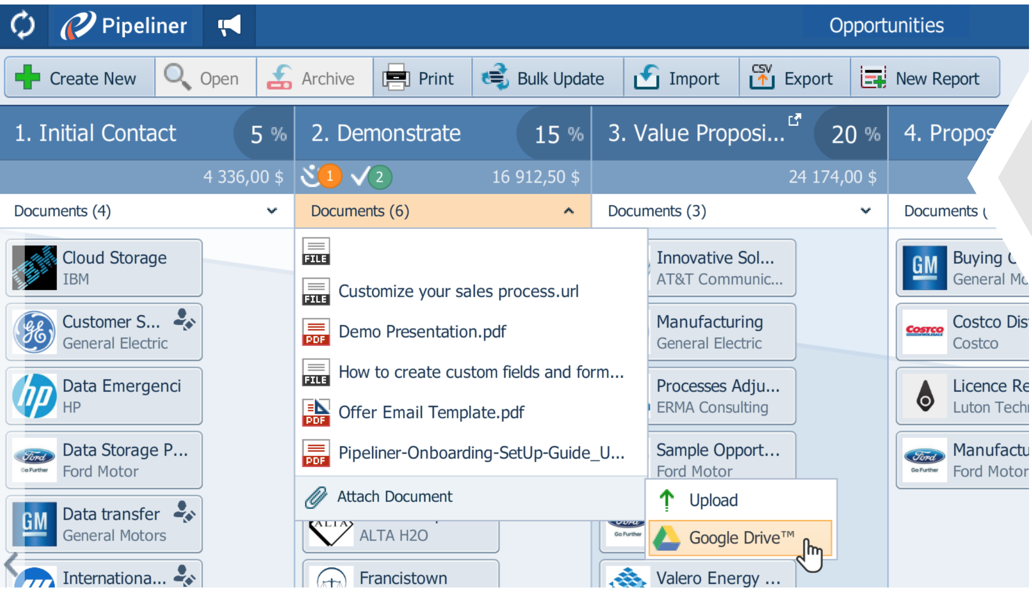
And, there is: **with Pipeliner CRM Sales Document Management features**.

Right Where You Need Them

With Pipeliner, store documents at every Sales Stage, accessible right from the main Pipeline View. Documents are only one click away–no searching.

Documents from Pipeline Sales Stages can also be instantly imported into **individual Accounts**, **Contacts**, **Leads** or **Opportunities** when needed—right into the "Documents" section.

Documents can also be uploaded directly to these areas from Box, Dropbox, Google Drive, SharePoint or from a local drive.

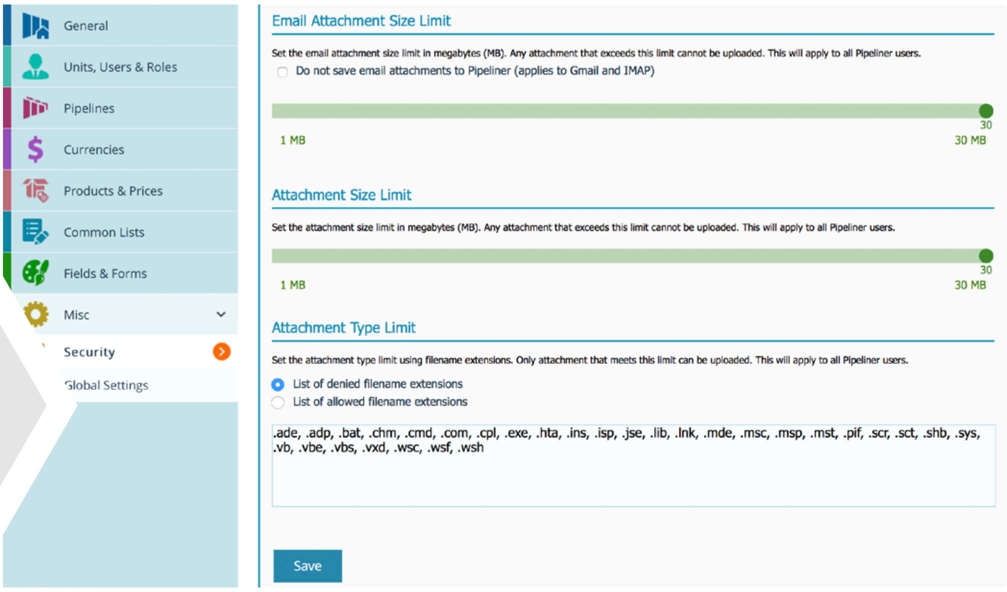


Sales Document Management

Sales Document Management is accessible right from within the Pipeline View, and integrates with popular cloud services such as Dropbox, Box.com and Google Drive.

Documents Customization

Like most Pipeliner features, document management is flexible and customizable.



Microsoft Office Plug-In

Open and Update Microsoft Office Files – Right in Pipeliner

The Microsoft Office Add-In App enables 2-way functionality between Pipeliner CRM and Microsoft Office files: Microsoft Outlook, Microsoft Word, Microsoft Excel, PowerPoint, Visio, and Microsoft Project. With this app installed, you can:

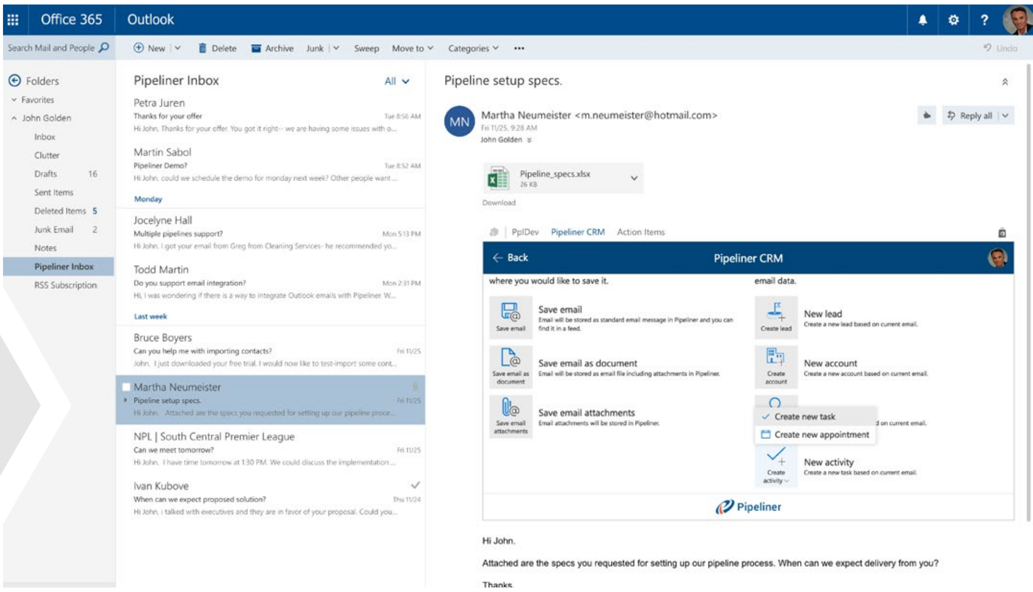
- Open and update your Office files right from within Pipeliner
- Save your files using Office directly within Pipeliner
- Use document templates to record your sales activities
- Store, sync, and send files to others in your sales team
- Save any file from your PC directly to Pipeliner (using the Windows “Send to” feature)

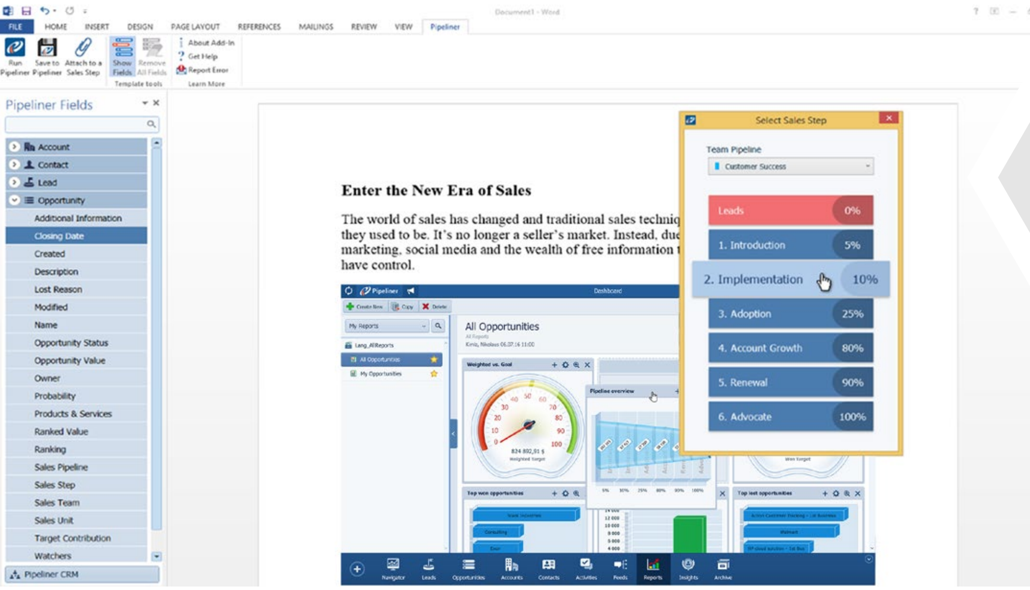
The Microsoft Office Add-In App is available **free of charge to all Pipeliner CRM customers**. Click here to obtain the App.

Please Note: Currently the Add-In and Outlook Plugin are only available for the Windows versions of MS Office 2010 and MS Office 2013.

MS Outlook Add-In

Now you can always work in Outlook, while taking advantage of Pipeliner’s Instant Intelligence, Visualized.



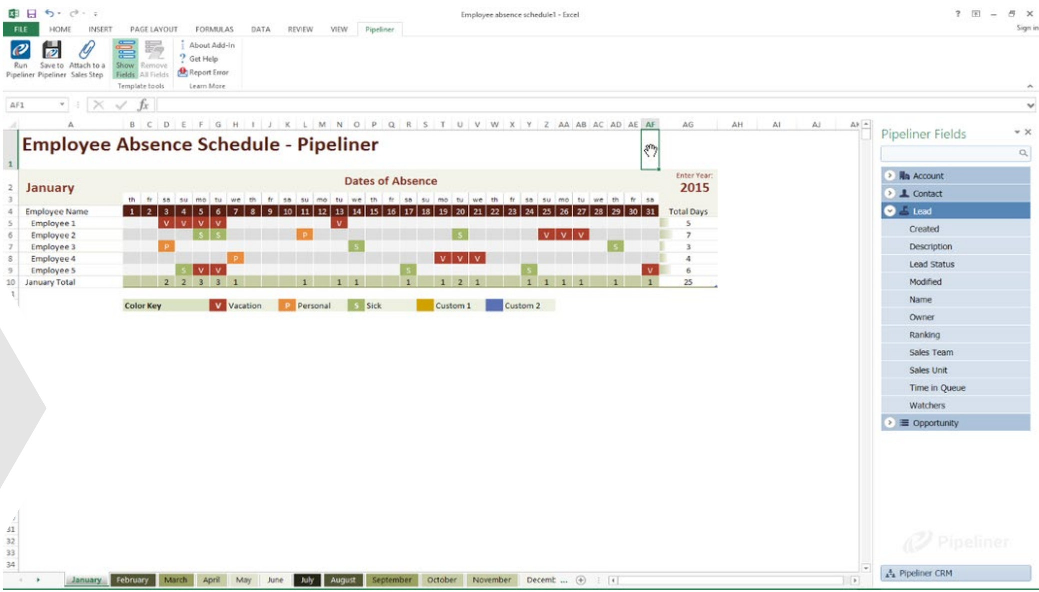


MS Word Add-In

Create and edit Microsoft Word Documents, right from within Pipeliner CRM.

MS Excel Add-In

Create and edit Microsoft Excel spreasheets, right from within Pipeliner CRM.



STAGE 4

CLOSE AND COOPERATE

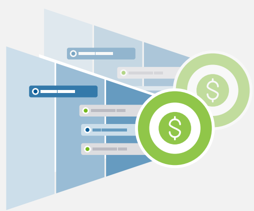
As we saw in the ebook *Reducing Risk*, at the fourth stage of the Pipeliner Selling System, *Close*, your buyer has become a customer. If your company is intelligent and realizes that your customer is your most valuable asset for future business, the close of the sale is the beginning of an entirely new and exciting journey for your buyer.

Ultimately your aim is to move that customer into the next and final stage of the Pipeliner Selling System, *Cooperate*. At that point your customer has become an advocate—and is much more of a partner than a customer.

From the *6 Fundamental Principles Found in Pipeliner CRM* (found in the ebook *Reducing Risk*, link above) the principle that applies to both the *Close* and *Cooperate stages* is "Trust." At this point you have created and must continue to create trust between yourself and your new customer/advocate.

For both of these stages, all of the Pipeliner features mentioned in previous chapters apply in a maintenance mode. For example, you're going to need to keep your **Smart Org Chart & Buying Center** constantly up-to-date so that you always know who to contact at that company. You'll want to maintain your relationships through **Social Selling**, so that it is always current. You'll want to review the customer's **Account** from time-to-time so that you can speak with relevance whenever talking to them.

There are 3 final features, however, that are particularly applicable to the *Close* and *Cooperate* stage of the Pipeliner Selling System:



MULTIPLE PIPELINES

MULTIPLE ACCOUNTS

BULK UPDATE FEATURE

Multiple Pipelines

As any smart sales organization knows, a dynamic and operating sales process is vital. But many organizations have discovered that a single process is not enough.

For example, what about deals that are lukewarm and still require nurturing? These might be best served in their own **pre-sales process**. A lead would be placed into this process and would proceed to the point they are closer to purchase, at which point they would be moved into the regular sales process.

Or—in an example pertinent to these last steps of the Pipeliner Selling System—an existing customer, following the close of the sale, would be better served in a **customer management process**. This process (as further detailed in *Reducing Risk*) would include regularly checking in with the customer to see how business is going, regularly scheduling business reviews, and implementing metrics to measure the continuing success of your product or service within their organization.

The customer management process—just like the pre-sales process—would require its own pipeline.

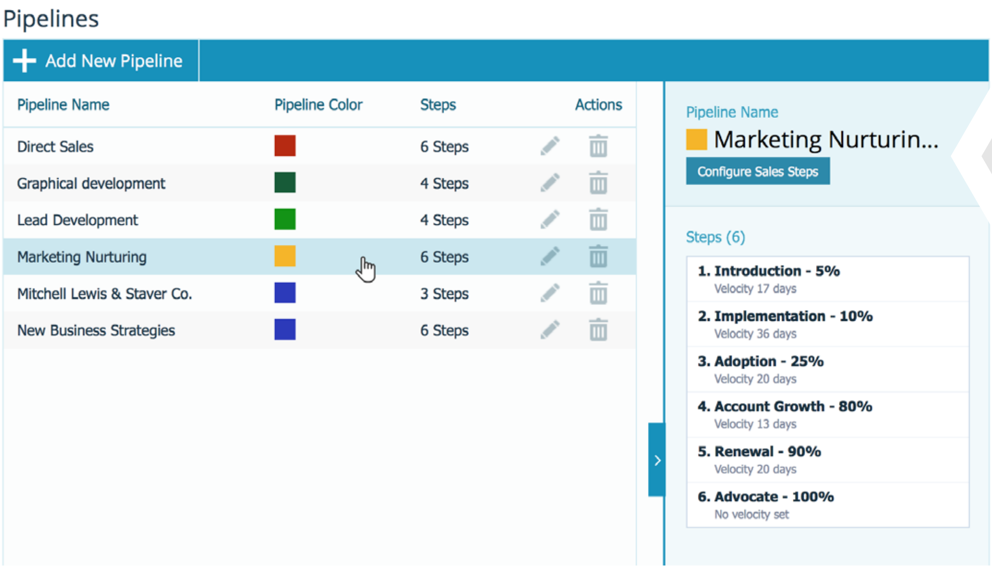
Pipeliner Accommodates Multiple Pipelines

Because we at Pipeliner are salespeople, too, we have certainly observed these necessities. Hence Pipeliner has been developed so that you can operate as many pipelines as required by your company.

Like all of Pipeliner's features, this one, too, is totally visual and extremely easy. If, following the above example, a deal is ready to move from the **pre-sales process** to the **main sales process**, it can simply be dragged-and-dropped from one pipeline to the other. Since all pipelines share the same database, all pertinent information will move right along with that deal. The same is true after the **deal closes**—it can be **dragged-and-dropped right into the customer management process**.

Many Uses

Pipeliner's Multiple Pipeline feature has many other applications. For example, companies might have different sales processes for different product lines. Or, they might have differing processes for different territories. In each case, a **CRM solution with multiple pipeline—common database functionality is a vital necessity**.



Multiple Pipelines Feature

Pipeliner has been developed so that you can operate as many pipelines as required by your company.

Associating and Consolidating Multiple Accounts

As leads come in, and as your sales team is selling, companies get entered into the CRM system as they become prospects and then opportunities. Data is added and built up as opportunities become accounts and as they move through the sales process (pipeline) stages.

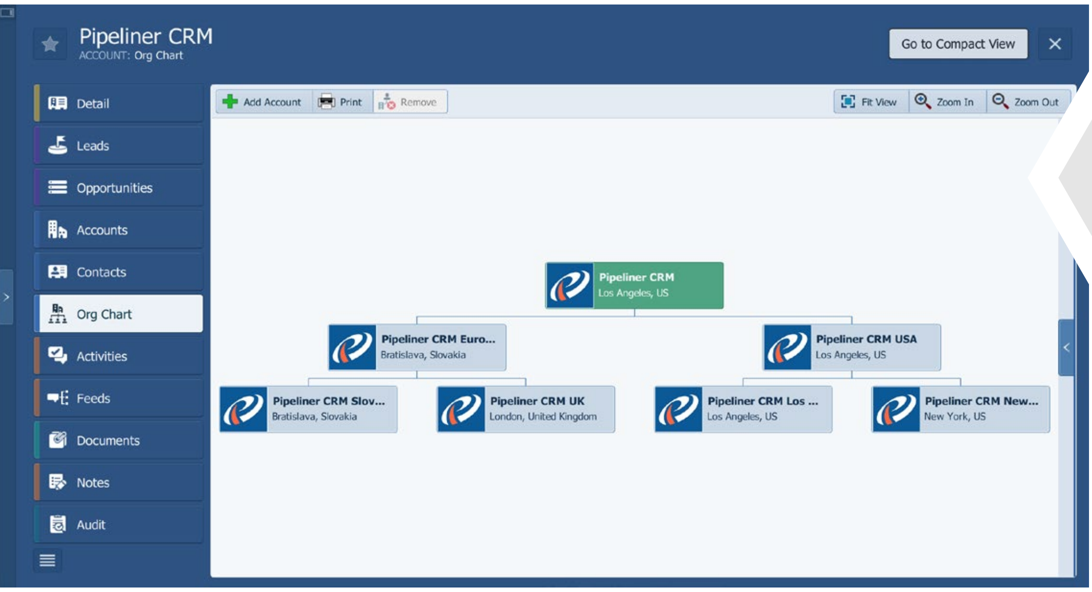
But what happens when it is discovered that 2 or more of these companies are actually related? It can certainly happen today, especially within the same industry. As an example, your customer XYZ Company might own another of your customers ABC Company. You might even discover that XYZ company must ultimately approve any purchases being made by ABC company.

This has been going on for some time, but your organization only became aware of it long after these 2 companies had been in your database for quite awhile. So how can this association be easily shown in Pipeliner, without eliminating one or the other as separate entities?

With our new Parent Account feature, this can now be done: you can assign a parent account to an existing account—in our example, XYZ Company could be assigned as a parent account to ABC Company. This new feature also allows the assignment of multiple accounts under one account.

You can also show such relationships within account data. You can also select a particular account, and aggregate data from multiple accounts into that selected account.

Our Visual Org Chart functionality completely supports our Multiple Account Association feature, so that data on such associations will be visually reflected



Accounts Hierarchies

Visually map out your customer company's hierarchy to always understand who you're dealing with.

Bulk Update Feature

Sometimes, unexpected change affects your entire sales organization:

- A salesperson leaves. What happens to all their accounts and contacts?
- You have a major release that pushes out all your Close dates two weeks.
- A consultant moves to another firm – and they're associated with three Opportunities in your pipeline.

Pipeliner's Bulk Update feature makes **global changes to your CRM data** easy – **no need for making individual changes to accounts**. No worry that some crucial piece of information didn't get updated. **No wasted time**.

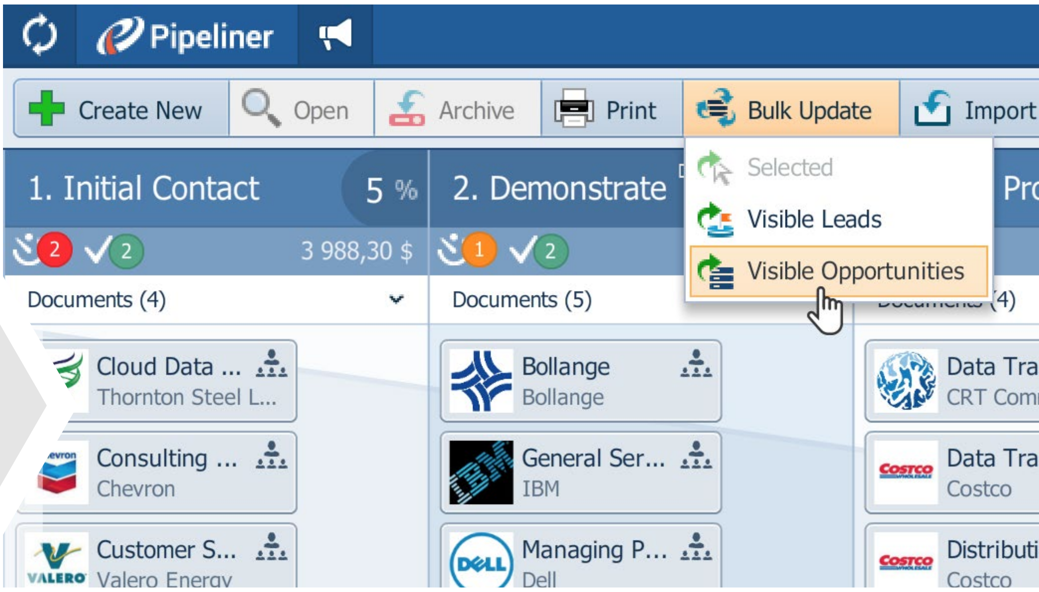
- Select the Accounts you need to update.
- Select the Field or Fields you want to update. Change them to the new information.
- Click the "Bulk Update" button at the top of the Pipeliner CRM interface.

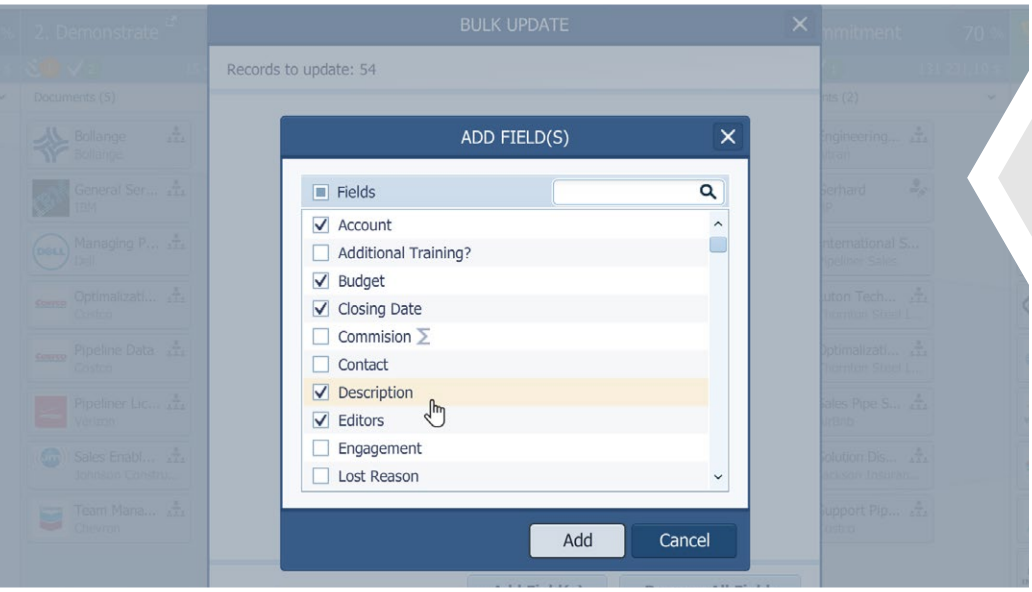
Work that previously took hours now takes minutes!

The Bulk Update feature is yet another reason why Pipeliner is the **most efficient and cost-effective** answer to your customer relationship management issues.

Bulk Update

Pipeliner's Bulk Update feature makes global changes to your CRM data easy – no need for making individual changes to accounts.

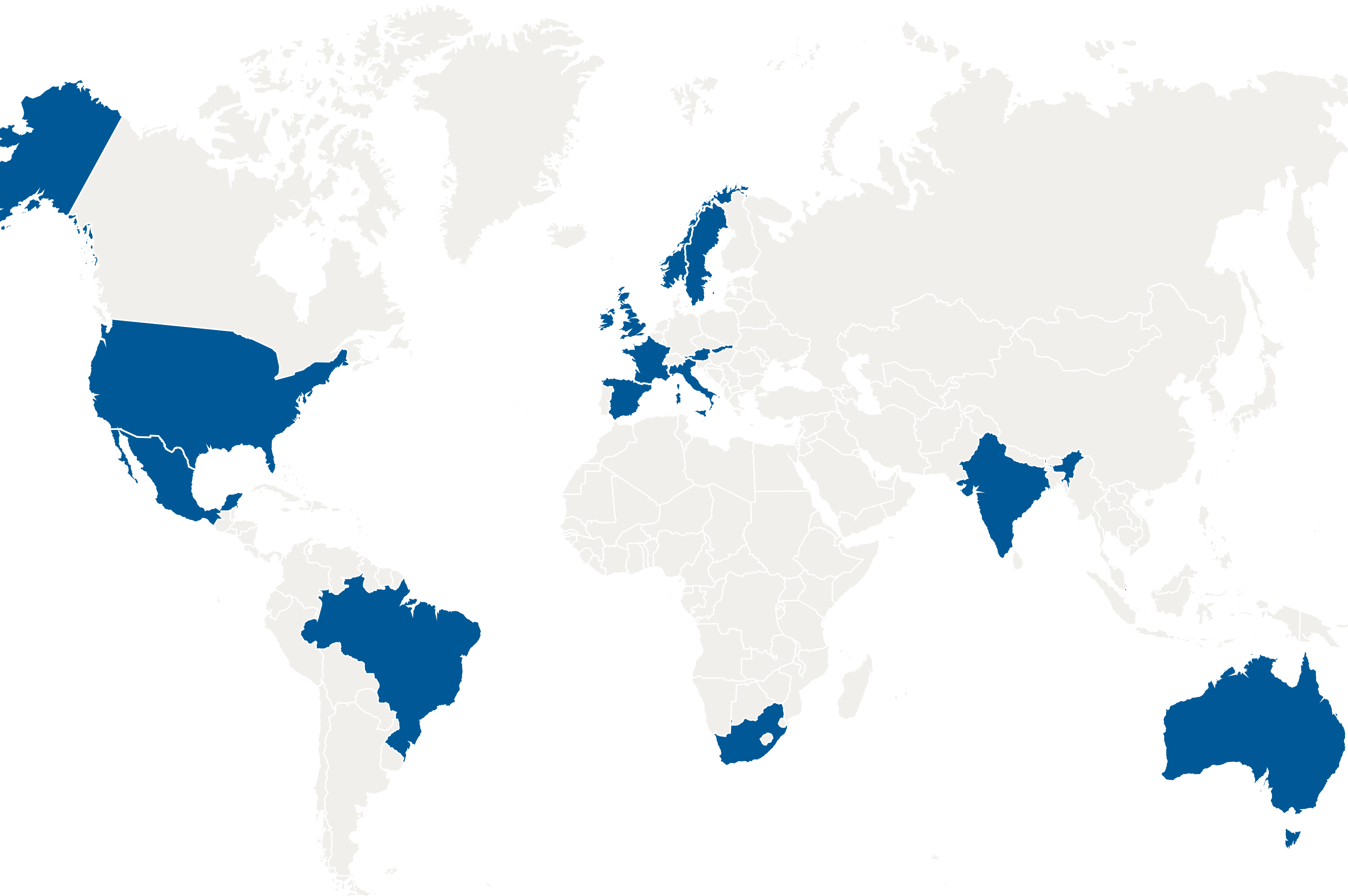




Bulk Update Settings

The Bulk Update feature is yet another reason why Pipeliner is the most efficient and cost-effective answer to your customer relationship management issues.

Pipeliner



Contact

Website: pipelinercrm.com

Email: info@pipelinersales.com

Phone: 1-888-843-6699

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