



AIM Institute

INDUSTRY:

Information Technology and Services

SPECIALTIES:

information technology, career development, grant writing services, and educational programs and initiatives

COMPANY SIZE:

51-200 employees

WEBSITE:

<http://aiminstitute.org>

Scott Rowe
Director of
Digital Innovation



The AIM Institute

AIM is an innovative not-for-profit organization that grows, connects and inspires the tech talent ecosystem through career development and educational programs. Our efforts culminate in an array of services for a variety of audiences. Being a relatively small organization, we must strive to leverage agile thinking to ensure our processes and systems continually improve. Embracing this mindset we will be able to continually deliver with greater effectiveness.

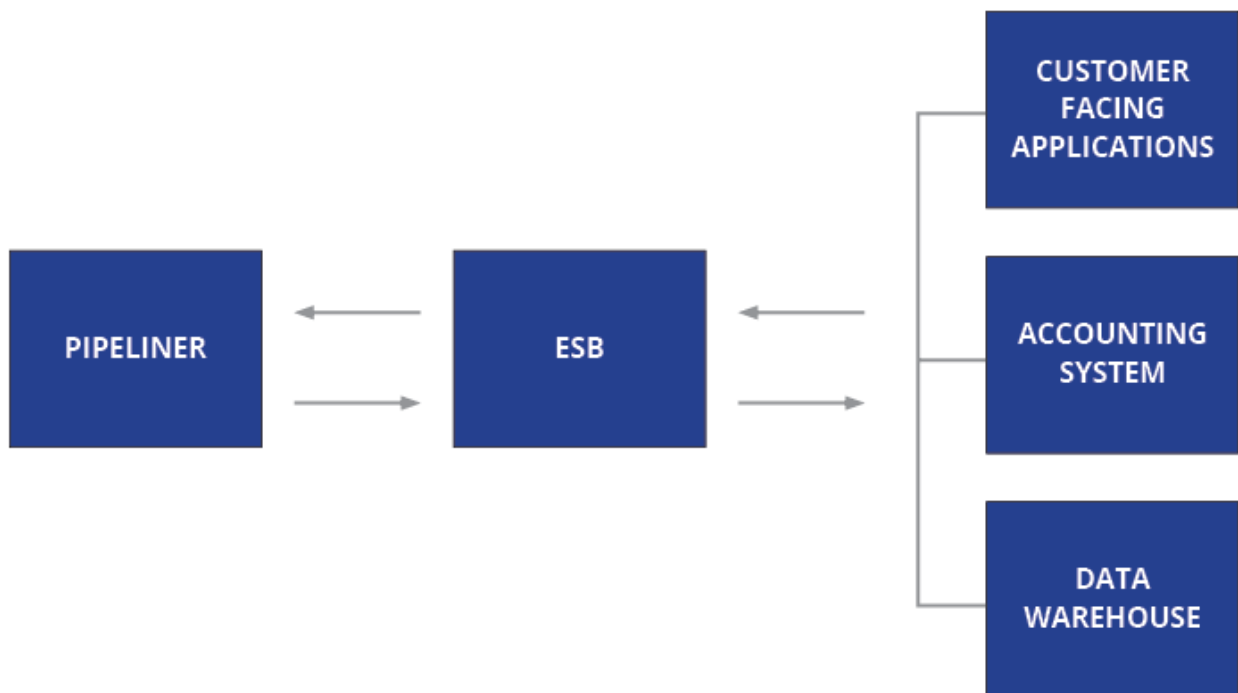
Over time we have used various software solutions for different business needs, but there are always limitations based on a solution's designed value proposition and flexibility. In late 2016 we set about to find a new solution that would not only provide us the needed core functionality of a CRM but also empower us to effectively cross-pollinate key business data across our disparate systems. We realized that this was an opportune time to connect these systems together for better business use and as a result



of this, set forth to integrate the Pipeliner CRM service with its accounting, marketing automation, data warehouse, and select web-based products. The goal was to have one primary system populating and visualizing key information about the business and its customers.

A key component of the selection of Pipeliner was its exhaustive API documentation. The service not only provides us with the ability to import and update key business data but accommodates for integration with multiple programming languages. Our internal development team worked hand in hand with the support team at Pipeliner ensuring integrations were complete using best practices and greatest efficiencies.

Organizationally we leverage Mule ESB as our primary enterprise service bus. Pipeliner's Java SDK made it very easy for our team to directly integrate with the ESB and create robust objects that in turn directly integrate with our existing services.



The results of our integration have culminated in the improvement of three major business focuses.

1. Reduced licensing costs
2. Data access centralization
3. Data synchronization





The leveraging of Pipeliner across the company has reduced our technology licensing costs. Through Pipeliner's advantageous pricing model, structured directly around user accounts, we have been able to reduce the number of user seats for several of our other SaaS solutions. This was only possible through our ability to pull data from these other services directly into Pipeliner CRM.

Pipeliner has given our organization a centralized tool everyone in the company has access to. It has increased the overall visibility of our business data – whether it be following a lead through the sales process, managing agreements, or even logging connections our staff has made in our community – we now have one tool for all to use.

By leveraging Pipeliner's robust API, we have the ability to support continual synchronization between our CRM and other business systems. Through this implementation we have been able to greatly reduce daily synchronization tasks and replace them with real-time data transfers.

We have been very pleased with the product, service team and vision of the product. It has become an important part of our business operations.

Pipeliner CRM

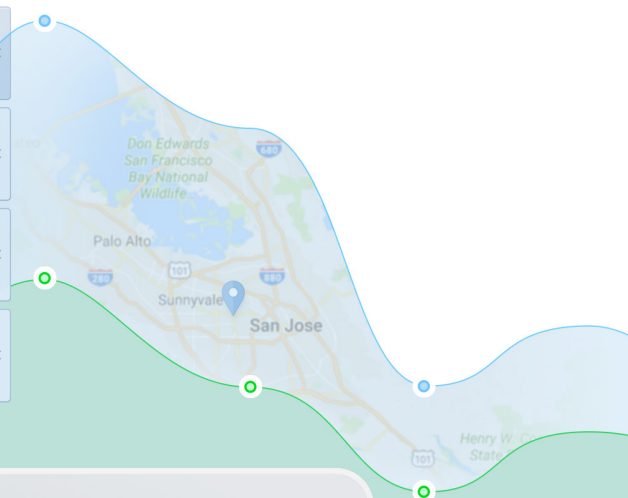
Enabling Sales Teams, Minimizing Risk!

 **TRY IT FREE**

or

 **FIND OUT MORE**

1		Beaudry, Gilles Sales Representative at Acmecorp	\$ 215,800	100 %
2		Perez, Vanessa Sales Representative at Acmecorp	\$ 192,300	93 %
3		Larson, Julie Sales Representative at Acmecorp	\$ 134,254	62 %
4th		Huang, Lee Sales Representative at Acmecorp	\$ 104,250	59 %



Present a solution
Task

Managing Process
\$6,000.00
Donnelly-Jerde

Target Overview
Period: Current Year (Jan 1, 2018 - Dec 31, 2018) Remaining: 130 Days

Everything is on the right track to achieve Target Goal!

Trend
Target Goal: \$2,000,000.00
Ranked Value: \$7,027,812.91
Balanced Value: \$655,707.22
Weighted Value: \$945,141.38

Weighted Target
\$985,895.63
49%

Target Goal
\$2,000,000.00

Notifications
Tasks: 6 tasks are overdue within 24 tasks
Missed Close Date: 4 Opportunities
Velocity Issues: 15 Opportunities

Suggestions
Ready to qualify: 37 Leads have completed Sales Activities
Ready to move: 20 Opportunities have completed Sales Activities
Old Leads: 37 Leads are still waiting to be qualified.

Calendar
24 Friday August 2018
25 Saturday August 2018
26 Sunday August 2018
29 Wednesday August 2018
30 Thursday August 2018

Mobile View
Open Lead: SP Partners Group
Days in queue: 11
Ranking: ★★★★★
QUALIFY LEAD
Labels: FOCUS, HOT, STALLED
Ownership: Kimla, Nikolaus



The Pipeliner Universe — Sales Enablement, Knowledge, Networking

Pipeliner CRM
pipelinersales.com

Sales POP!
salespop.net

Go Ahead!
go-ahead.global

