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• *Unique Selling Propositions* •

PIPELINER CRM

1 The Target

Being able to forecast accurately and proactively manage the pipeline is critical.

When you don't have all the data and only part of the picture the risks to your revenue projections and the health of your business are increased.

- ✚ The Target provides multiple ways of viewing data to deliver the full revenue picture.
- ✚ Flexible views allow executives, managers, teams, and individuals to manage revenue risk in realtime and take proactive action.
- ✚ This helps eliminate uncertainty and unpredictability from revenue projections.

Different views of revenue projections



Set your goal KPI.

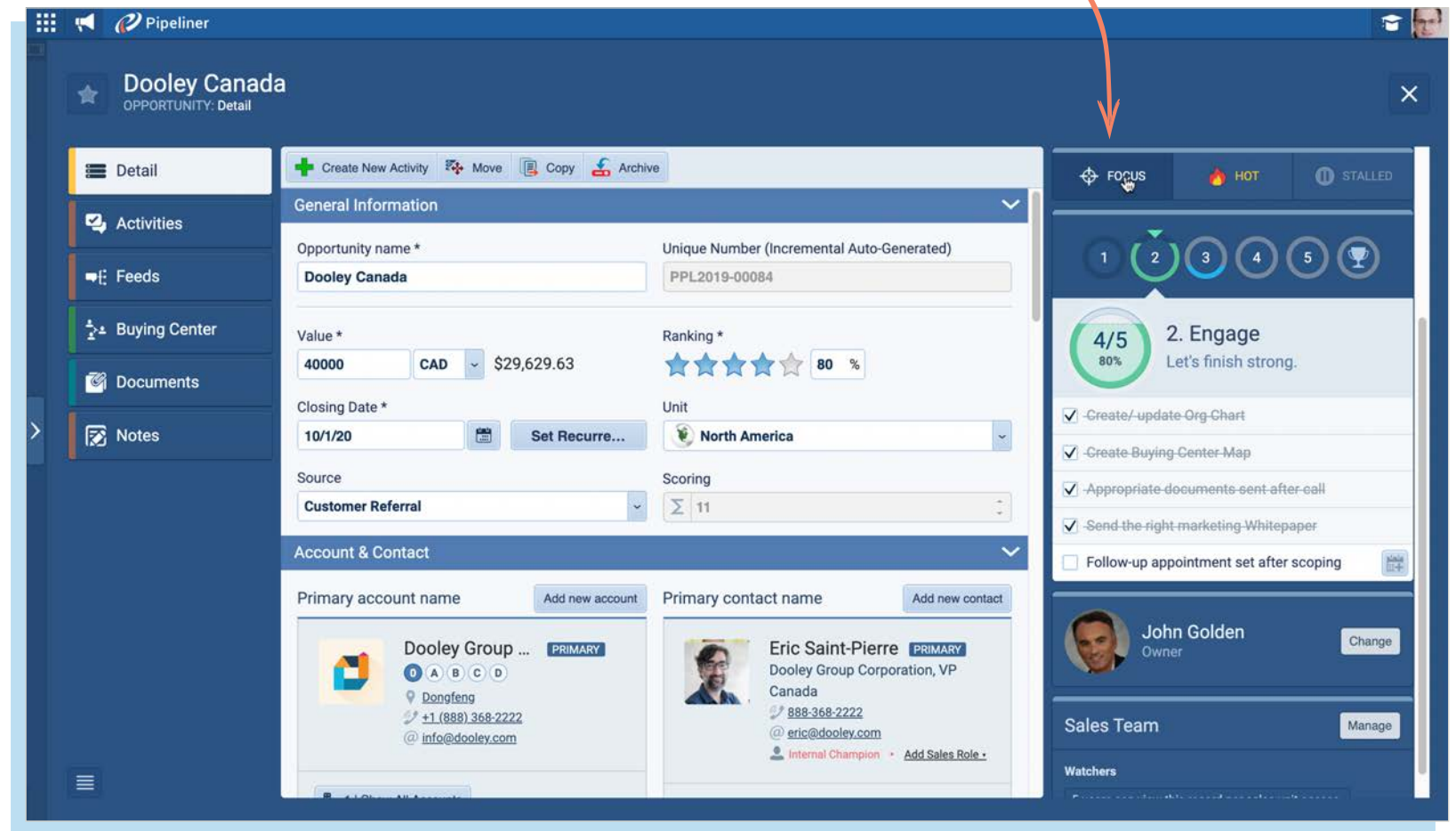
2 Buyers Action & Sellers Activities (Sales Methodology)

Inconsistency in the sales process and the lack of a common sales language means opportunities are often insufficiently qualified or sitting in the wrong stage.

This results in lost or delayed deals, missed forecasts and misalignment with buyers.

- ✚ Within each stage of the sales process, activities the seller needs to complete and actions the buyer needs to take can be set.
- ✚ This provides a defined path for each salesperson to follow and eliminates inconsistency.
- ✚ These can even be made mandatory before an opportunity can progress.
- ✚ This is how any sales methodology can be embedded in the daily workflow of every salesperson.

Check as done!



The screenshot displays the Pipeliner CRM interface for an opportunity named 'Dooley Canada'. The interface is divided into several sections:

- Left Sidebar:** Contains navigation options: Detail, Activities, Feeds, Buying Center, Documents, and Notes.
- Main Content Area:**
 - General Information:** Includes fields for Opportunity name (Dooley Canada), Unique Number (PPL2019-00084), Value (40000 CAD, \$29,629.63), Ranking (4 stars, 80%), Closing Date (10/1/20), Unit (North America), Source (Customer Referral), and Scoring (11).
 - Account & Contact:** Shows details for the Primary account (Dooley Group) and Primary contact (Eric Saint-Pierre).
- Right Sidebar:**
 - Progress Bar:** Shows a progress bar with 5 stages. Stage 2, 'Engage', is currently active and highlighted.
 - Checklist:** Lists tasks to be completed:
 - ✓ Create/update Org Chart
 - ✓ Create Buying Center Map
 - ✓ Appropriate documents sent after call
 - ✓ Send the right marketing Whitepaper
 - ☐ Follow-up appointment set after scoping
 - User Profile:** Shows the profile of John Golden, Owner.
 - Sales Team:** Shows the Sales Team and a 'Manage' button.
 - Watchers:** A section for monitoring the opportunity.

3 Buying Center/Org Chart/Relationship Mapping

Find the Gatekeepers and map account hierarchy.

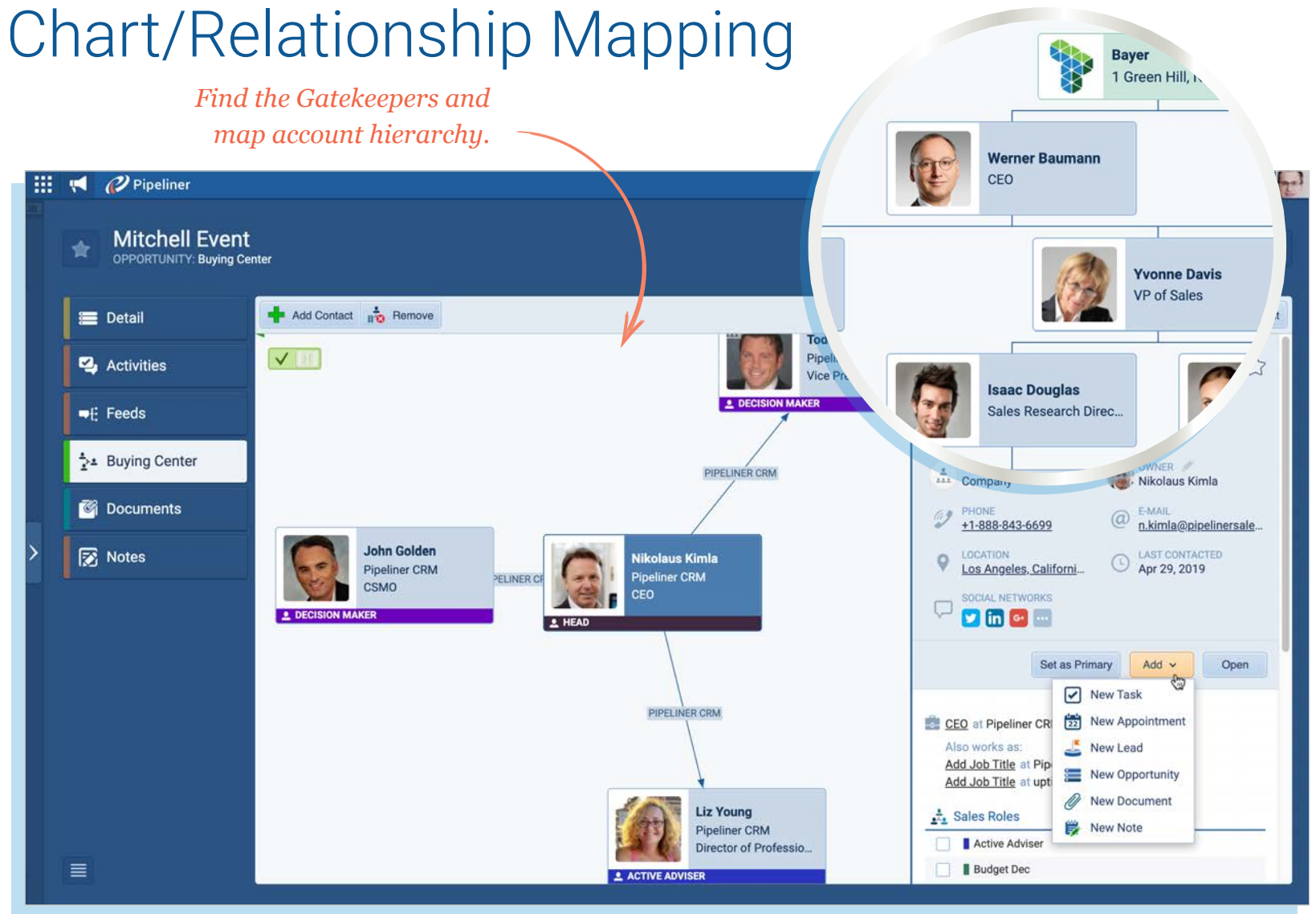
B2B selling has become more complex and hard to navigate. Today there is an average of 5-7 people involved in the buying process and success depends on understanding the roles and motivations of all the stakeholders.

Growing and expanding accounts also relies on understanding what are increasingly complex organizations.

Pipeliner is the only CRM that provides the ability to visually map out:

- 👉 How a company is organized hierarchically.
- 👉 How individuals both inside and external to the company are influencing a deal.
- 👉 Relationships between contacts both internal and external to the company.
- 👉 The overall company structure.

This visual mapping capability provides the key to informed strategic selling.



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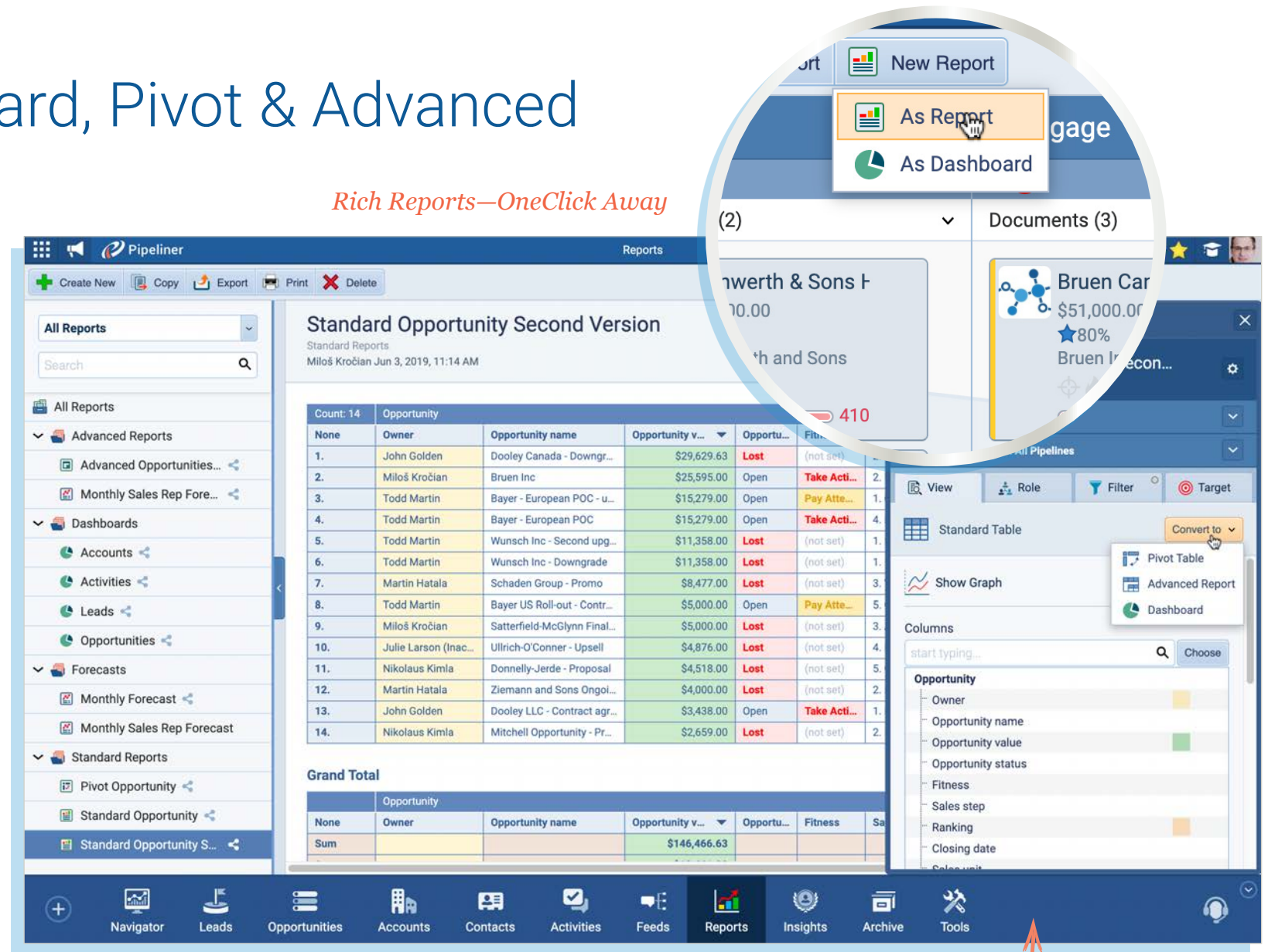
Reporting — Standard, Pivot & Advanced

Different people have different reporting needs - some need instant, simple reports and, others need to be able to manipulate the data in different ways.

This often means exporting data into different applications and systems which often leads to data being in multiple places, inaccessible and out of date.

- ✚ Pipeliner offers the most flexible and versatile reporting engine available.
- ✚ Each person can easily build reports in the system and manipulate the data.
- ✚ These can range from simple standard reports, to pivot reports to complex, advanced reports depending on the needs of the individual.

Rich Reports—OneClick Away



The screenshot displays the Pipeliner CRM Reports section. The main report is titled 'Standard Opportunity Second Version' and shows a table with 14 opportunities. The table columns include Opportunity name, Opportunity value, Opportunity status, and Fitness. A circular callout highlights the 'New Report' button and its dropdown options: 'As Report', 'As Dashboard', and 'As Pivot'. Another callout shows the 'Convert to' dropdown menu with options: 'Pivot Table', 'Advanced Report', and 'Dashboard'. The bottom navigation bar includes icons for Navigator, Leads, Opportunities, Accounts, Contacts, Activities, Feeds, Reports, Insights, Archive, and Tools.

Count: 14	Opportunity	Owner	Opportunity name	Opportunity v...	Opportu...	Fitness
1.	John Golden	Dooley Canada - Downgr...	\$29,629.63	Lost	(not set)	2.
2.	Miloš Kročian	Bruen Inc	\$25,595.00	Open	Take Acti...	1.
3.	Todd Martin	Bayer - European POC - u...	\$15,279.00	Open	Pay Atte...	4.
4.	Todd Martin	Bayer - European POC	\$15,279.00	Open	Take Acti...	5.
5.	Todd Martin	Wunsch Inc - Second upg...	\$11,358.00	Lost	(not set)	1.
6.	Todd Martin	Wunsch Inc - Downgrade	\$11,358.00	Lost	(not set)	1.
7.	Martin Hatala	Schaden Group - Promo	\$8,477.00	Lost	(not set)	3.
8.	Todd Martin	Bayer US Roll-out - Contr...	\$5,000.00	Open	Pay Atte...	5.
9.	Miloš Kročian	Satterfield-McGlynn Final...	\$5,000.00	Lost	(not set)	3.
10.	Julie Larson (Inac...	Ullrich-O'Conner - Upsell	\$4,876.00	Lost	(not set)	4.
11.	Nikolaus Kimla	Donnelly-Jerde - Proposal	\$4,518.00	Lost	(not set)	5.
12.	Martin Hatala	Ziemann and Sons Ongol...	\$4,000.00	Lost	(not set)	2.
13.	John Golden	Dooley LLC - Contract agr...	\$3,438.00	Open	Take Acti...	1.
14.	Nikolaus Kimla	Mitchell Opportunity - Pr...	\$2,659.00	Lost	(not set)	2.

Run Standard, Pivot or Advanced Reports

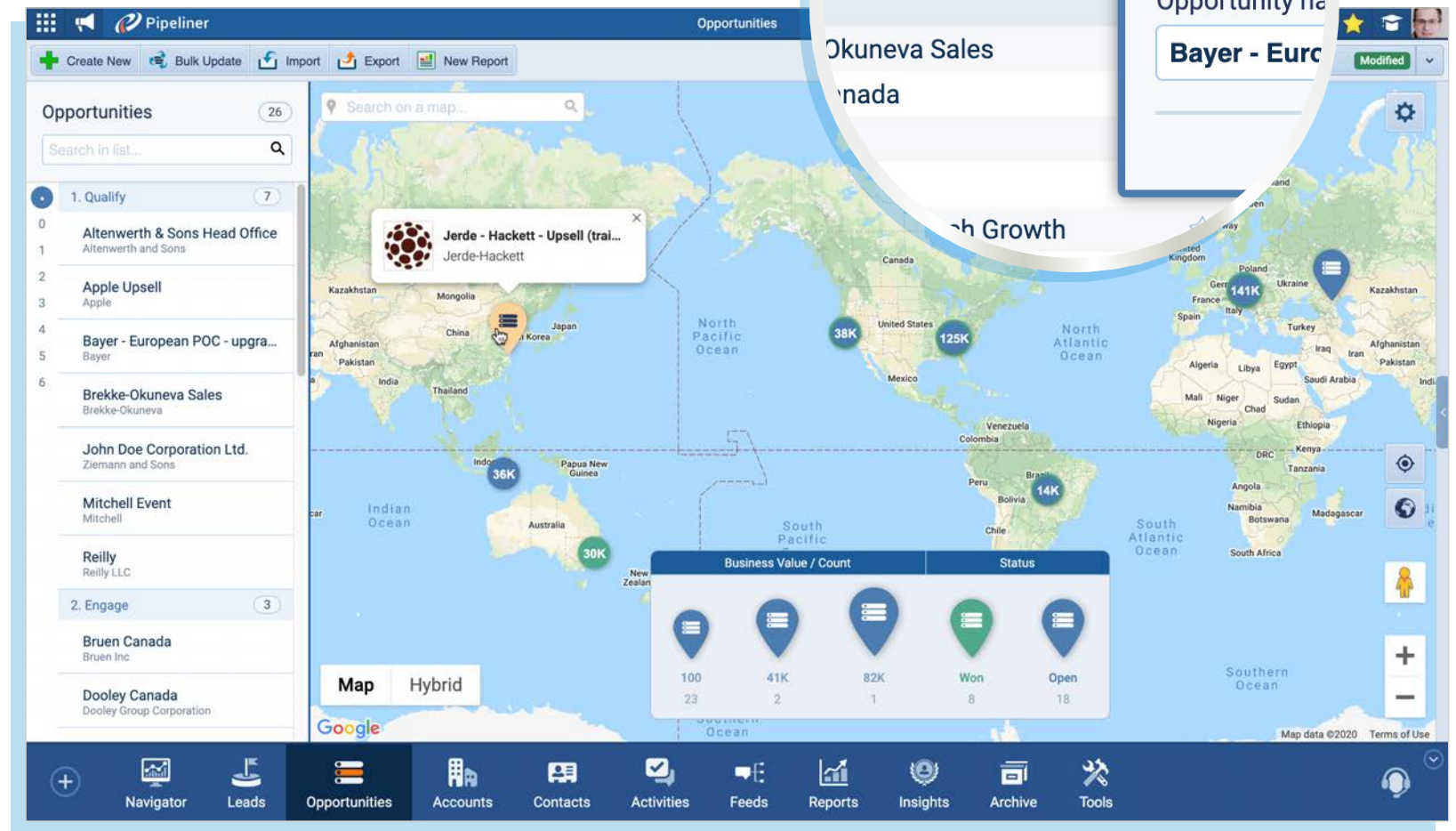
5 Multiple Views (on all our entities)

Different people have different ways of consuming information.

Most systems provide only one or two ways of viewing data so there are always adoption issues.

- One factor in Pipeliner's high adoption rates is that it provides many different ways of viewing the same data.
- These views range from pipeline views to geographical map views, list views, bubble chart views, compact views, and detailed views.
- Not only does this cater to the various ways people like to view data, but being able to instantly view data in different ways provides more perspectives and insights.

Many different ways of viewing the same data

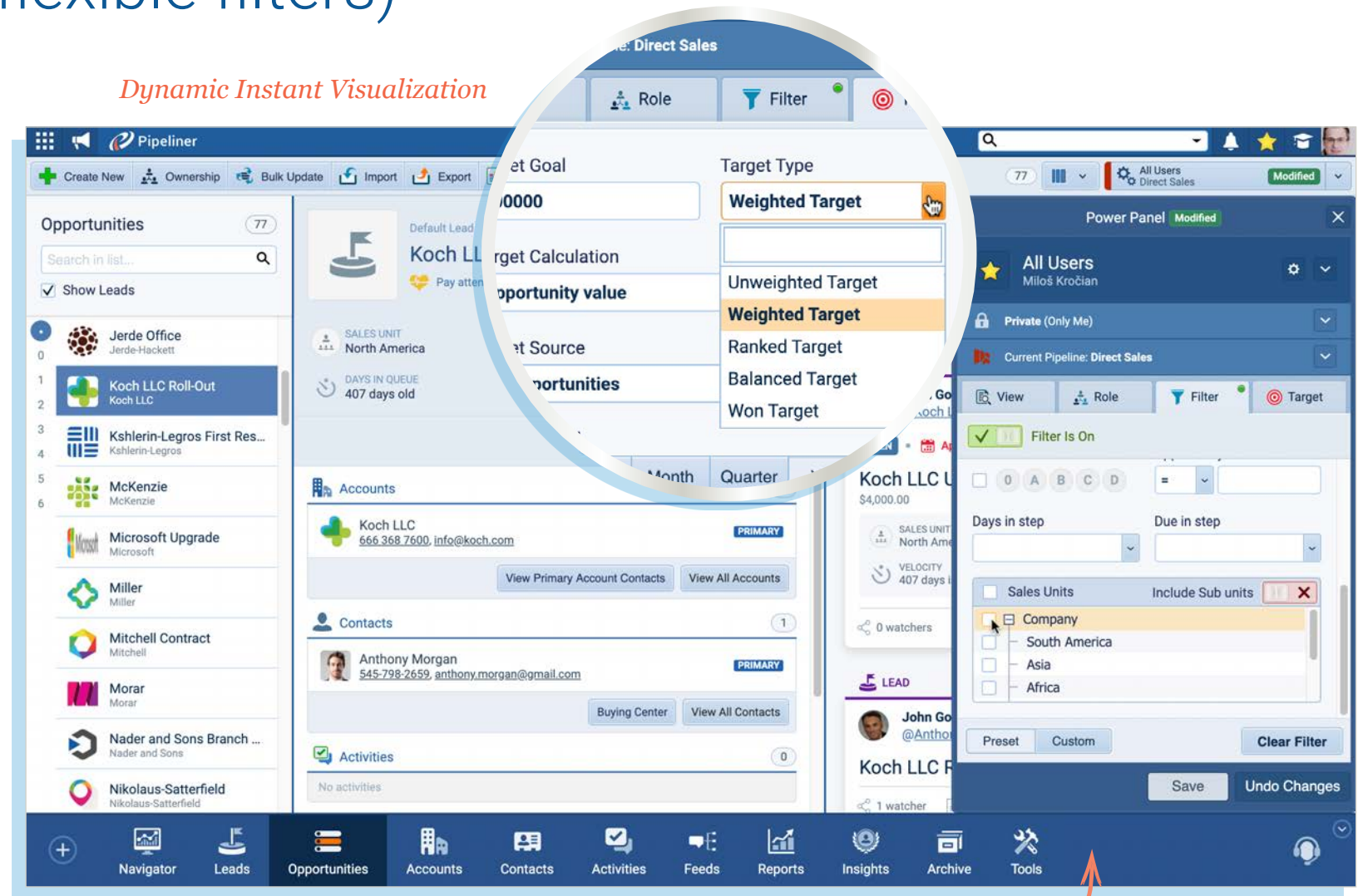


6 Power Panel (with flexible filters)

Most systems are inflexible, so it is hard to get at the information needed quickly.

These systems are hard to personalize to the individual or team needs.

- ✚ The unique Power Panel provides practical customization capabilities to any user.
- ✚ Individuals can instantly select what subsets of data they want to see, who they want to share it with and what details they want to see.
- ✚ Each user can do this for groups or individuals depending on user rights.
- ✚ In Pipeliner CRM, we call this Dynamic Instant Visualization!



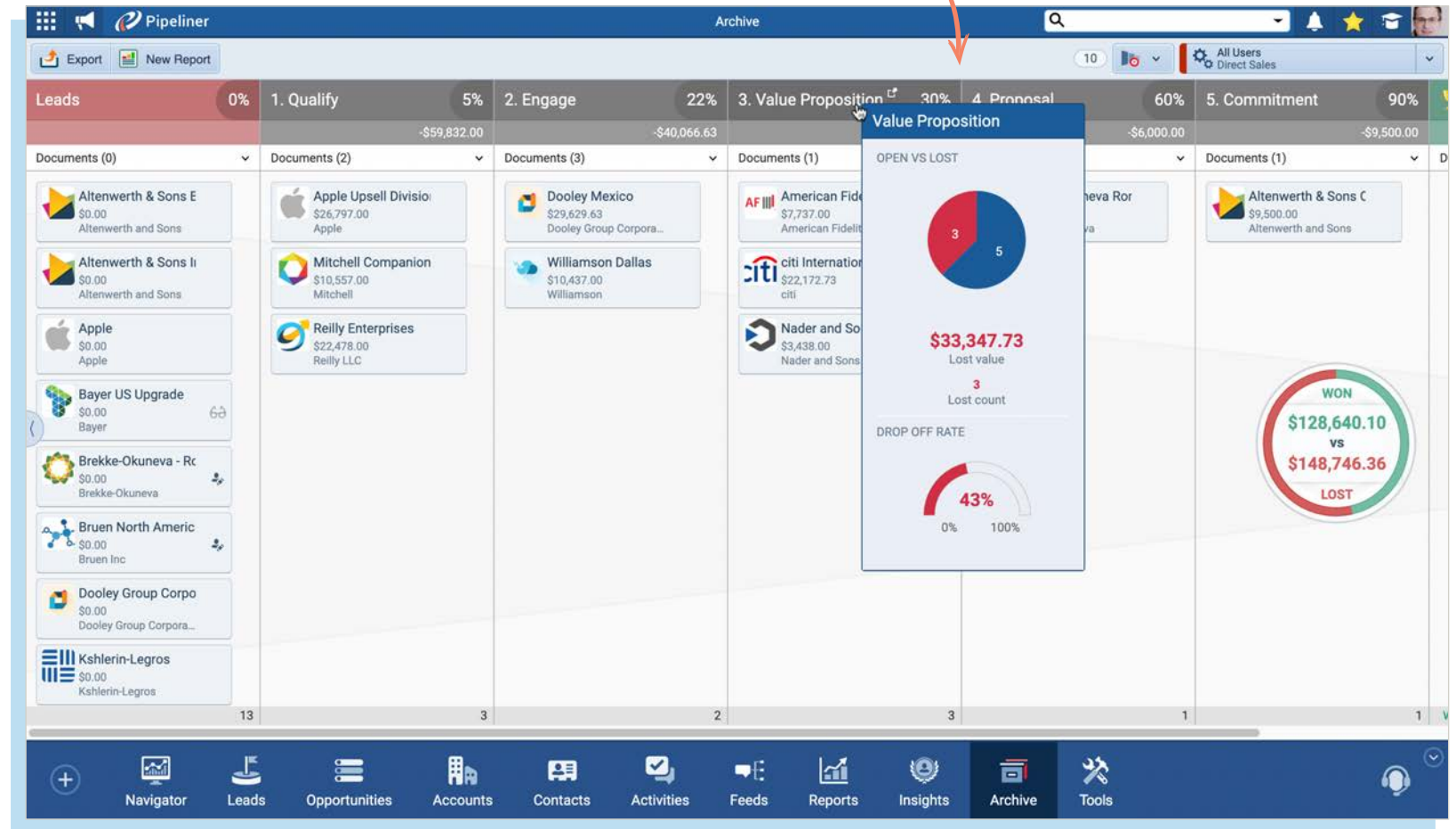
Practical customization capabilities

7 Archive

There is no way to systematically analyze or understand why deals are lost or what can be learned from those losses.



- ✚ The Archive provides a shadow pipeline where your lost opportunities are “frozen in time” at the stage of the sales process they were lost.
- ✚ This allows you to look for patterns or trends at an individual, team and process level and make informed adjustments as a result.

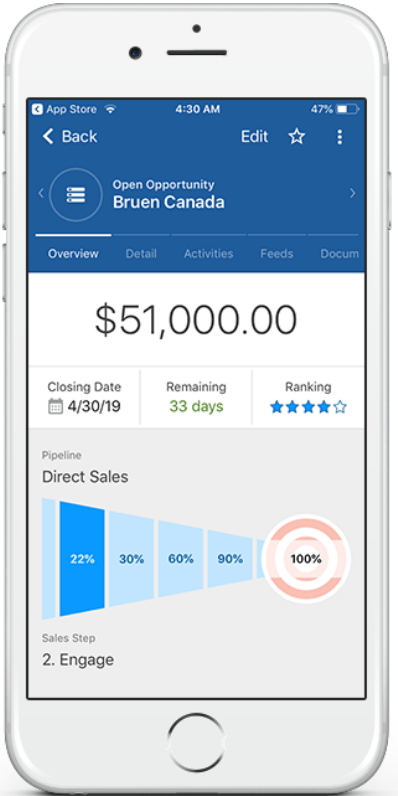
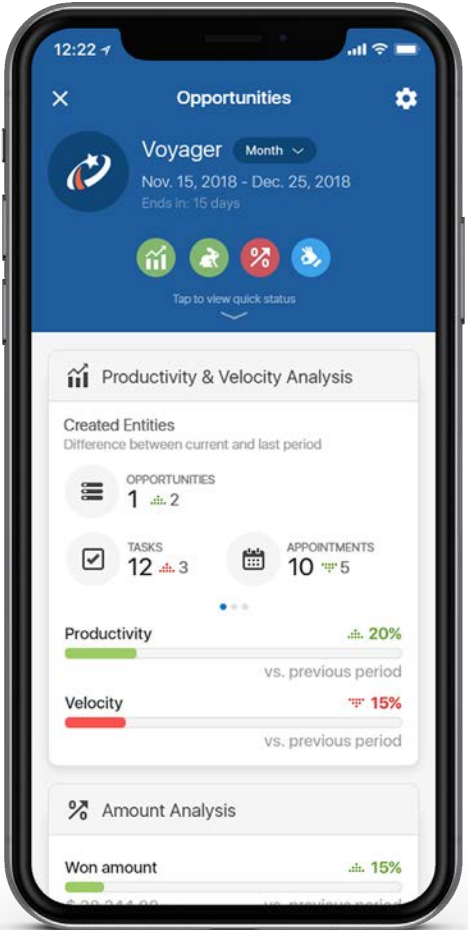
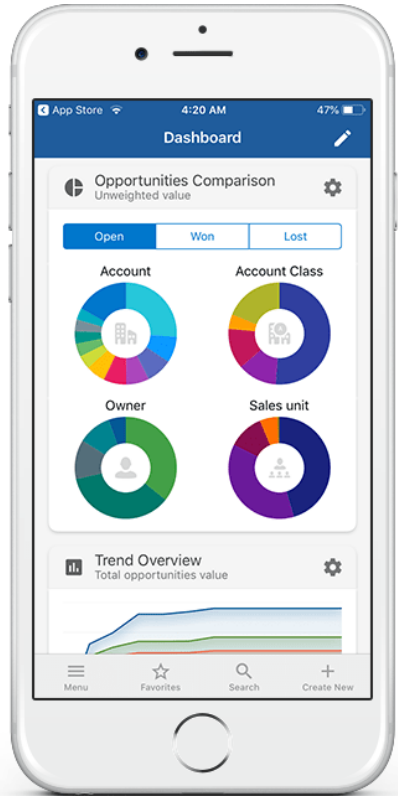
Additional informations visible in Archive



8 Mobile AI

Sometimes when salespeople are on the road or away from their desks, they don't always have the most up-to-date information or access to guidance when they need it.

-  The AI engine in the Pipeliner CRM mobile app provides instant, intelligent insights and guidance to salespeople right from their smartphone.
-  This helps keep them focused on the activities, opportunities, and leads that are the most critical at any given time.



9 Navigator

Precious time and productivity often lost by salespeople figuring out how to organize their day and where they should focus their energies.

- ✚ Navigator organizes critical information into one screen that shows where the salesperson is against their sales target, what is on today's calendar, what deals and leads need attention and even suggests other valuable activities.
- ✚ This is an intelligent quick start to any sales day.



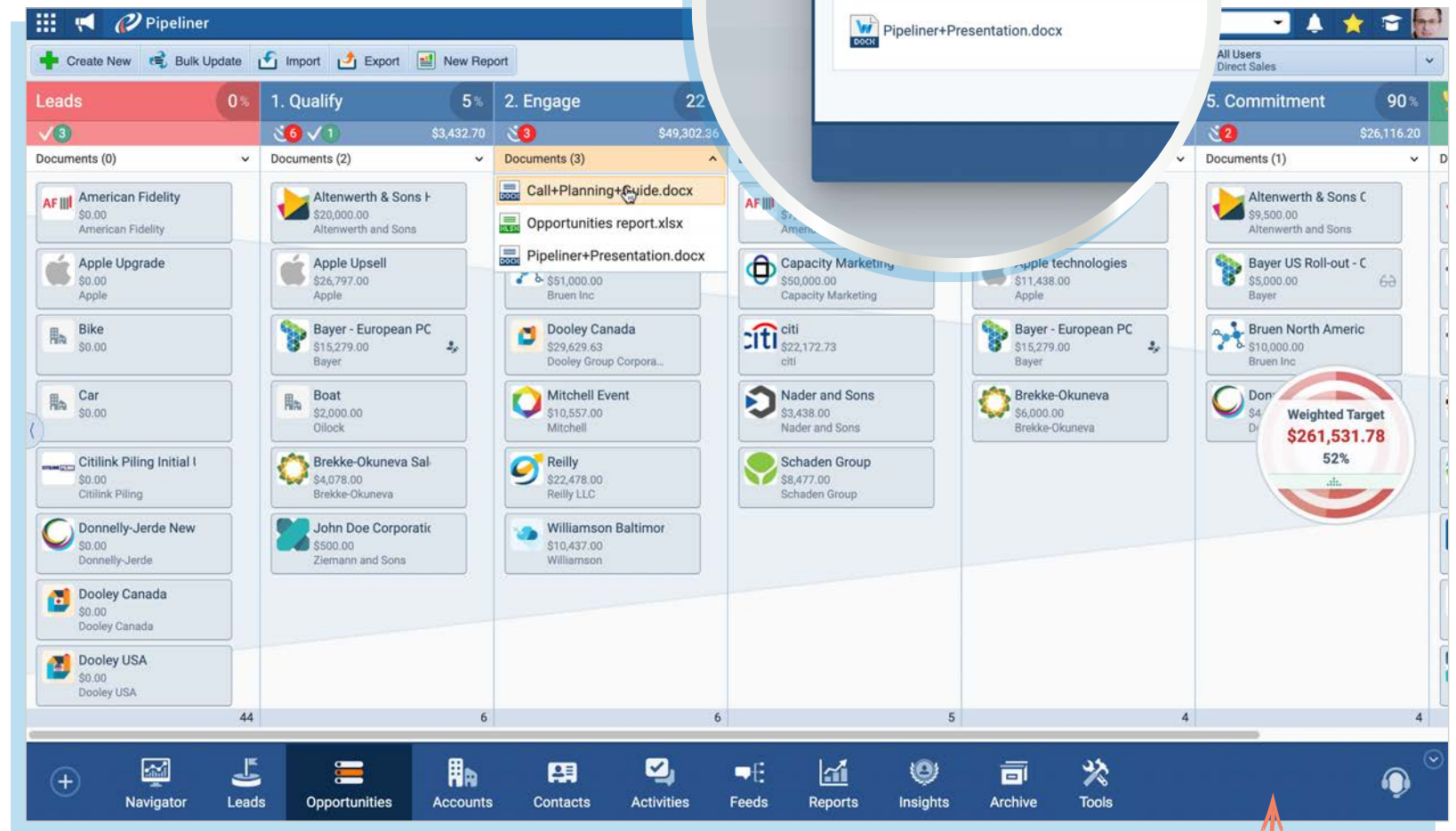
10 Attach Documents in the Pipeline

Salespeople often waste time searching for documents needed at different stages of the sales process.

Plus there is no consistency in what salespeople are sending customers and when.

- ✚ Pipeliner enables you to upload documents to each sales step so salespeople have access to the latest document update and at the right stage of the process.
- ✚ This guarantees, for example, that your team is using the correct marketing or pricing catalogs when talking to customers.

Upload documents to each sales step



The screenshot displays the Pipeliner CRM interface with a sales pipeline. The pipeline consists of five stages: Leads (0%), 1. Qualify (5%), 2. Engage (22%), 3. Propose (22%), and 5. Commitment (90%). Each stage has a 'Documents' dropdown menu. A circular callout highlights the 'Documents' menu for the '2. Engage' stage, showing three documents: 'Call+Planning+Guide.docx', 'Opportunities report.xlsx', and 'Pipeliner+Presentation.docx'. A red arrow points from the text 'Upload documents to each sales step' to the 'Documents' menu in the '2. Engage' stage.

Upload documents to each sales step

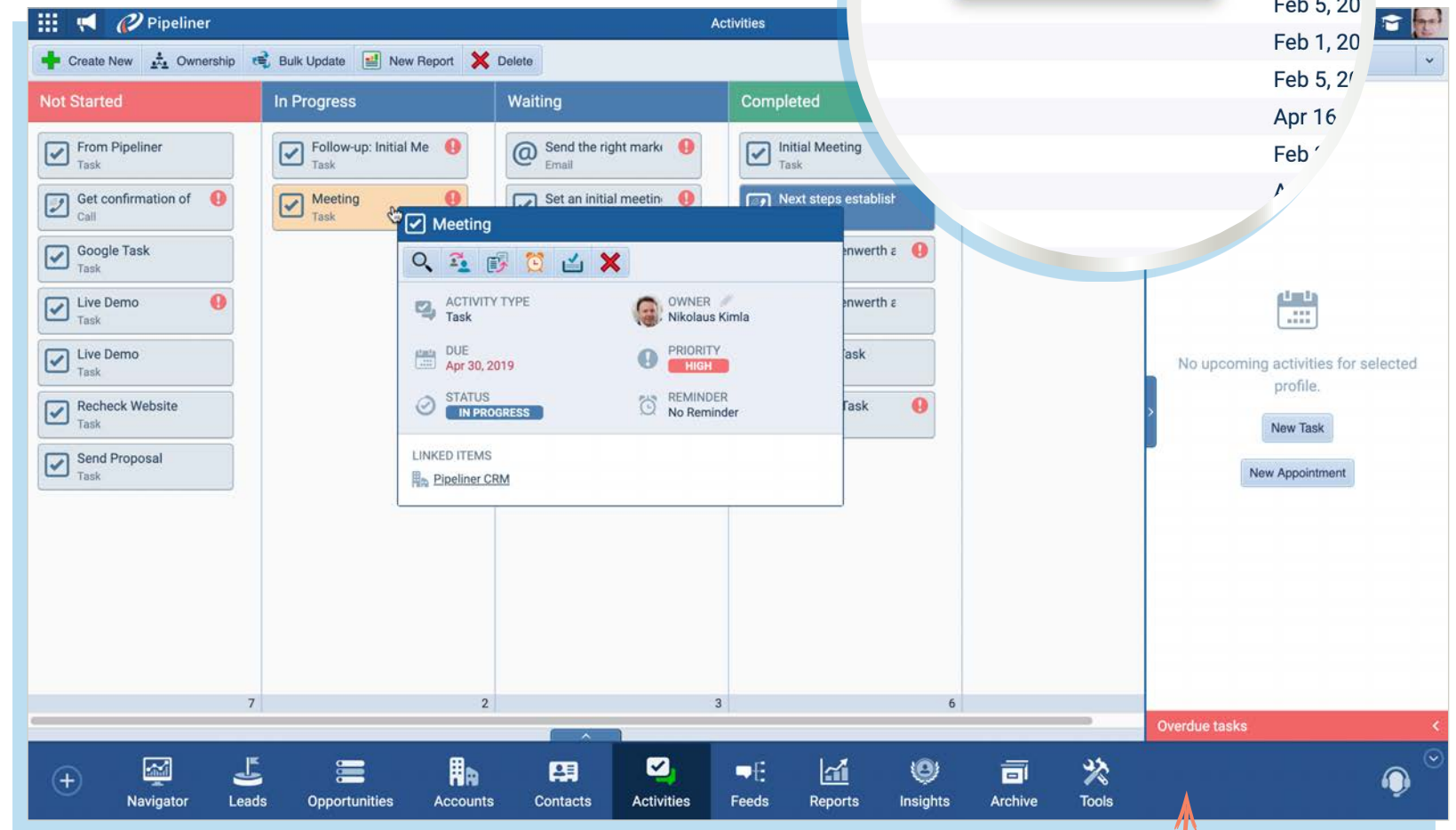
11 Multiple View on Activities Management

It can be difficult to track the activities of a sales team and even for salespeople themselves to track & manage their own activities.

This can lead to lost leads, mismanaged opportunities, and overall inconsistent performance.

- ✚ Pipeliner again provides multiple ways of viewing and managing Activities — the dedicated Activity view provides a calendar view, a list view, and a drag n drop task board view.
- ✚ These easy to access views make activity management simple and efficient.

Calendar view, a list view, and a drag n drop task board view



Activity management simple and efficient

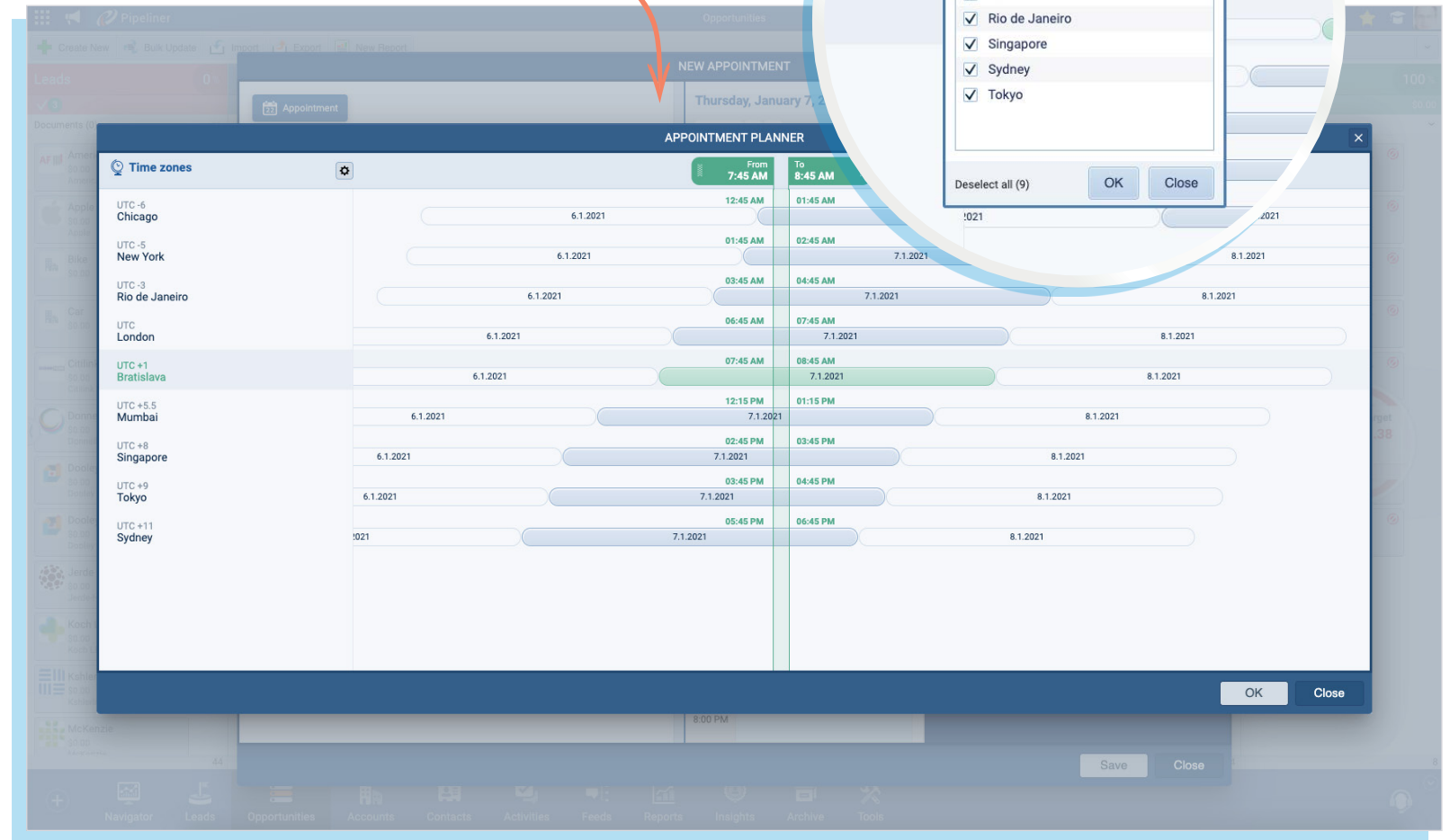
12 Timezone Checker

Salespeople often have to schedule meetings with prospects or customers in different timezones.

This often means switching from their CRM to another program or site to check the right timezone.

- 👉 Pipeliner's Timezone Checker, allows the user to simply view their time zone in relation to the timezones across the globe.
- 👉 The Appointment Planner is accessible directly within the appointment date and time settings.

View your time zone in relation to the timezones across the globe



The screenshot shows the 'Appointment Planner' interface. A 'NEW APPOINTMENT' window is open, showing a date of 'Thursday, January 7, 2021'. Below this, the 'APPOINTMENT PLANNER' window is displayed, showing a list of cities and their corresponding time zones relative to a selected time. The cities listed are: UTC -6 Chicago, UTC -5 New York, UTC -3 Rio de Janeiro, UTC London, UTC +1 Bratislava, UTC +5.5 Mumbai, UTC +8 Singapore, UTC +9 Tokyo, and UTC +11 Sydney. The time zones are shown as horizontal bars with start and end times. A callout box titled 'Choose a city which you want to display' is shown, with a search bar and a list of cities: Bratislava, Chicago, London, Mumbai, New York, Rio de Janeiro, Singapore, Sydney, and Tokyo. The callout box also includes a 'Deselect all (9)' button and 'OK' and 'Close' buttons.

Pipeliner CRM › Exceptional Engagement – The Better CRM

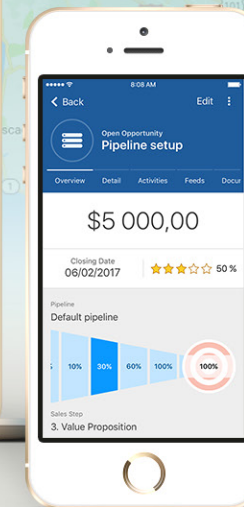
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 Pipeline setup
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