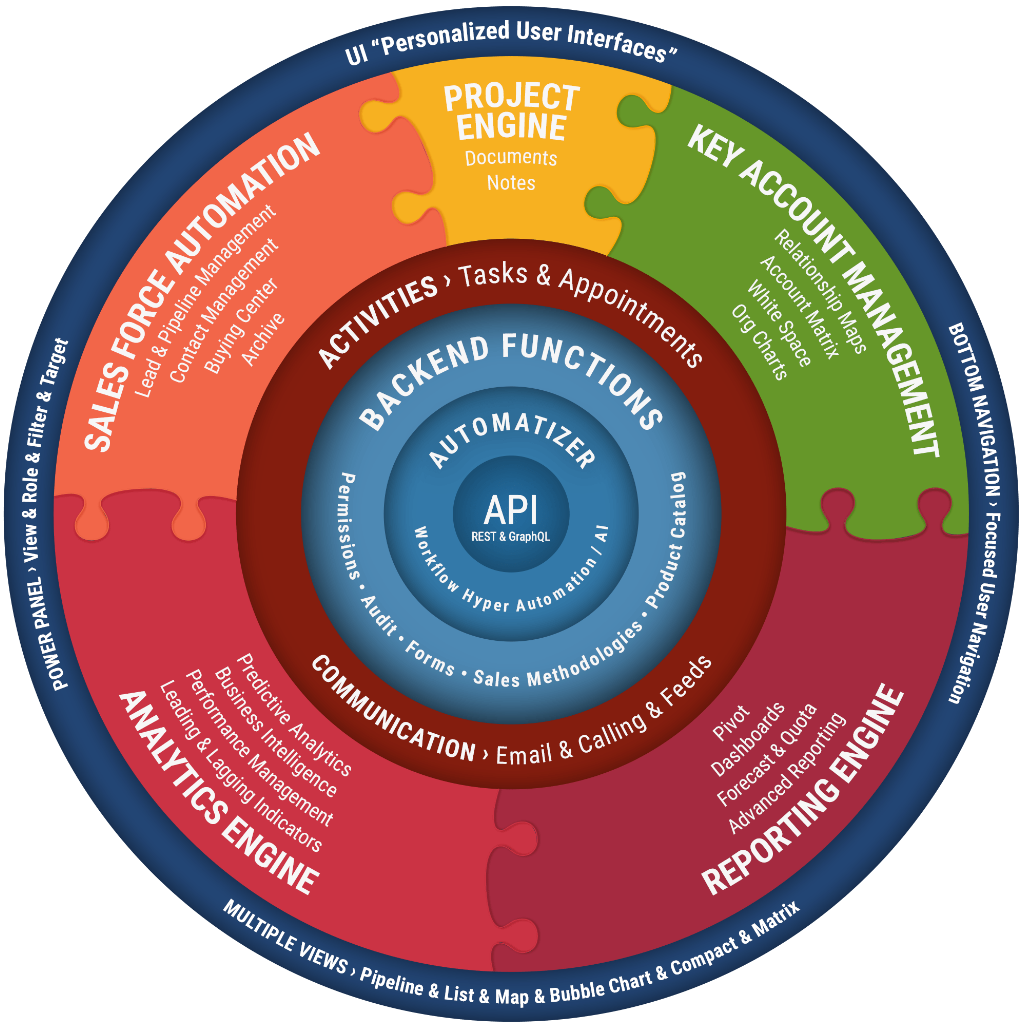
Pipeliner

Pipeliner Elements

↳ The Revenue Engine

TABLE OF CONTENTS

THE Revenue Engine



In this document we apply something we're very familiar with—visualization—and demonstrate how all Pipeliner CRM elements bring it all together in the Pipeliner CRM Revenue Wheel.

The wheel has 6 layers: the 3 internal layers show the backend administration, and the 3 outer layers show the user interface layers. In explaining these, we'll go from the outside in, beginning with Pipeliner's unique UI, our user interface.

Personalized User Interfaces

Layer #1

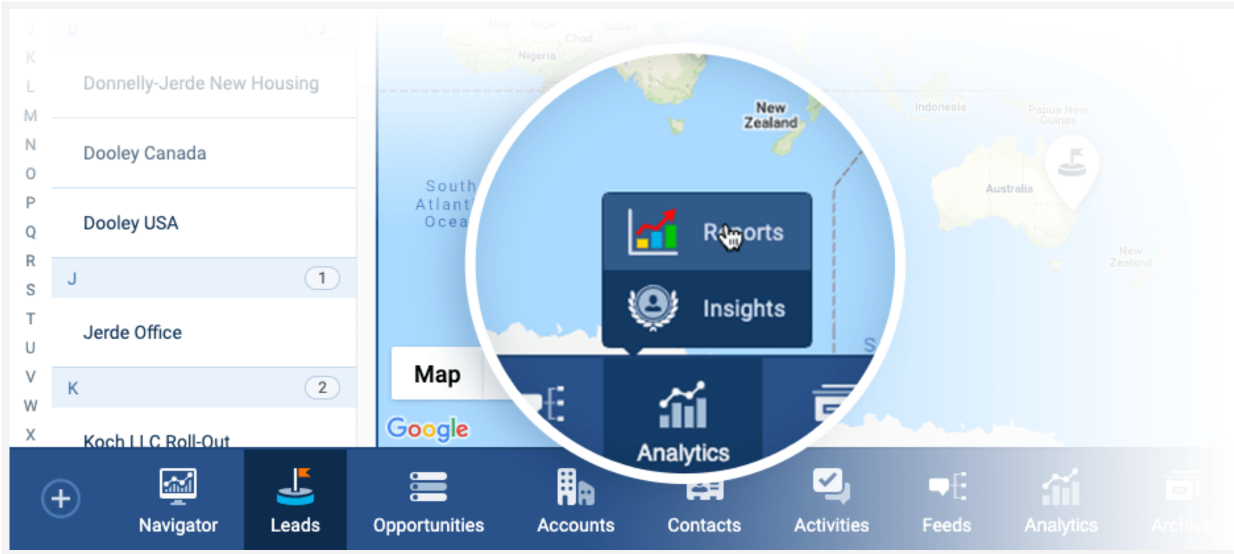
Personalized User Interfaces

Our personal user interface—consisting of our bottom navigation, power panel and multiple views--is totally unique to Pipeliner. The theory behind it is the same as that of a frame around a picture. It not only benefits the picture, but it provides the user a real focus on the data.

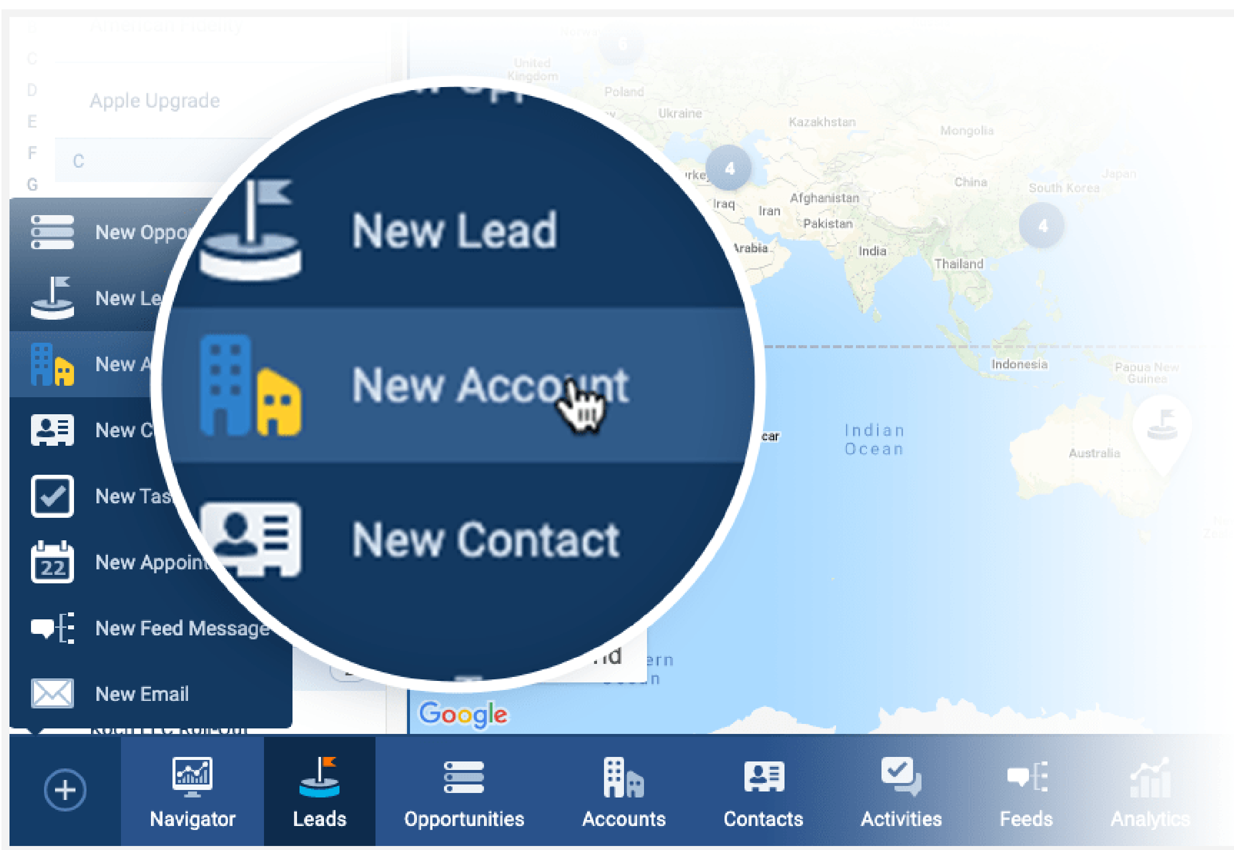
Pipeliner is the only CRM application worldwide that integrates this new form of navigation, not only overcoming this challenge by holding the frame together though the bottom navigation, but unifying, filtering and sharing data through the Power Panel. Each user can then personalize their view through any of the different multiple views.

Effective data visualization which is then personalized offers a deep insight into data for anyone. Data views not only work differently for each individual but also more broadly for different cultures and countries.

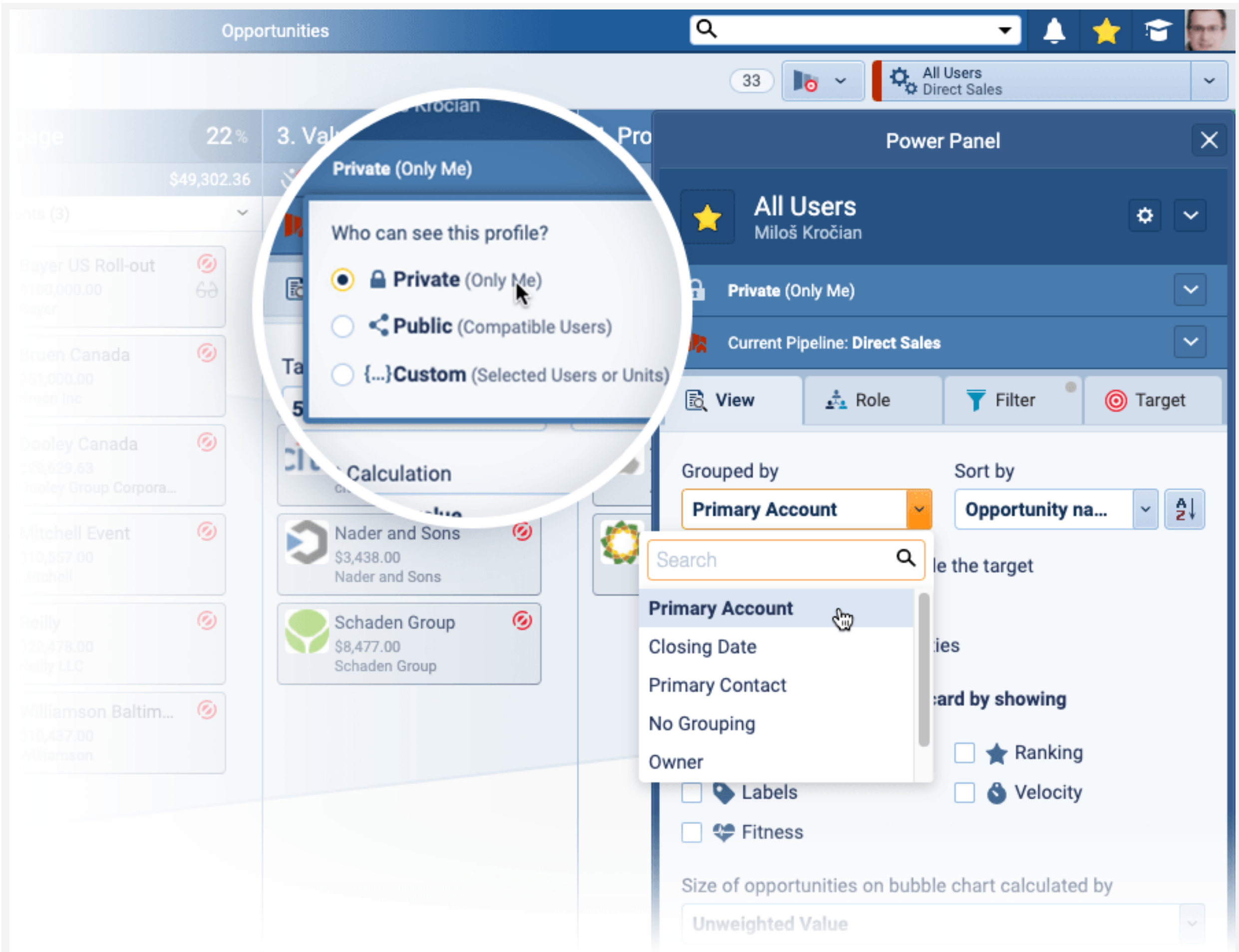
User Navigation



As part of this interface, we offer something no other CRM does, [our focused user navigation](), which appears at the bottom of the application, no matter where you are within the CRM. It is what ties the application together so that you're never lost.



Power Panel



Another essential part of the UI is [the Power Panel](). The Power Panel allows you to modify items you see in your current view, including roles, sales units, user profile, filter of data, sharing and more. This is [another feature]() no other CRM offers.

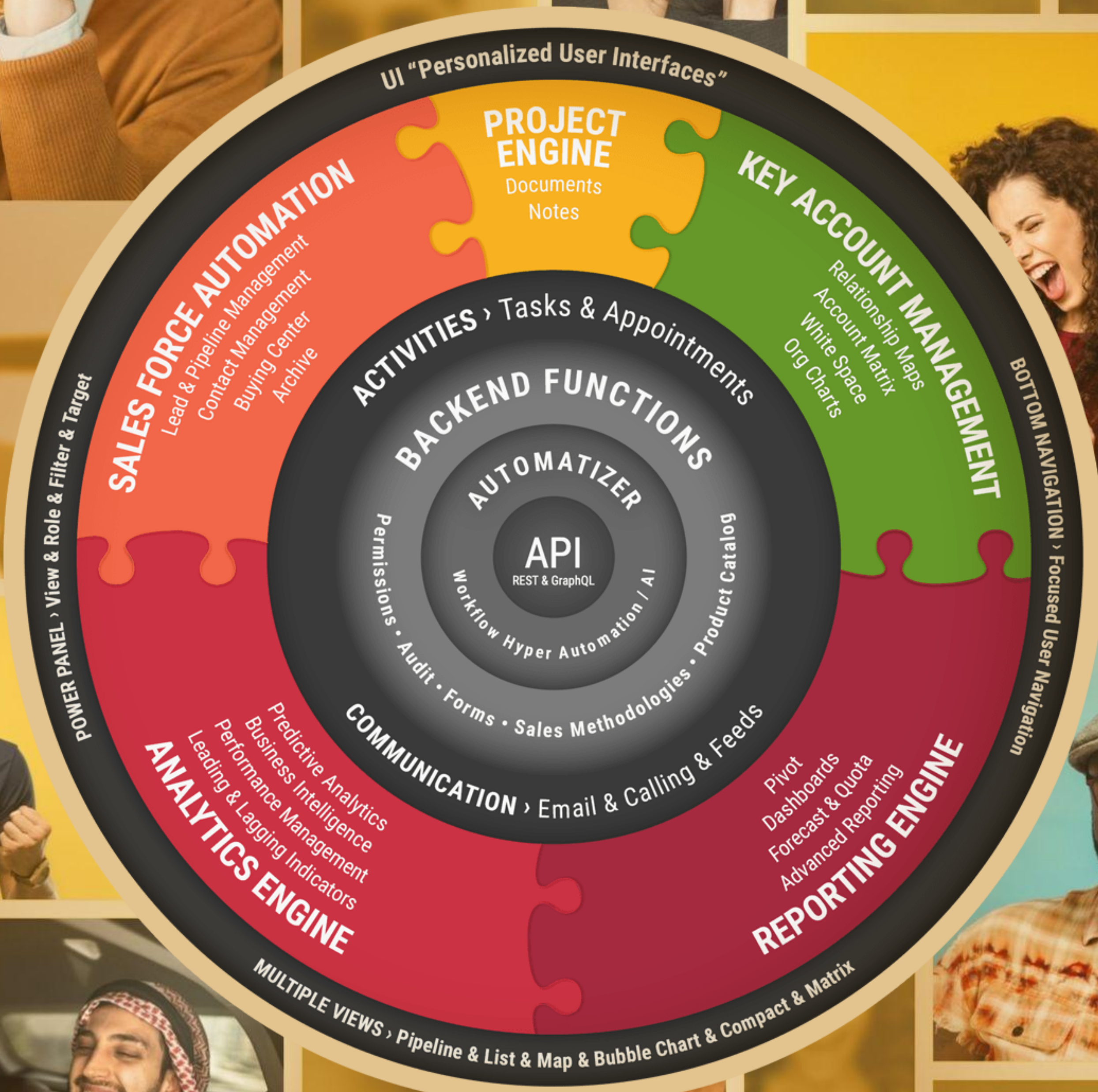
Multiple Views

No two people view data the same way. We all learn differently, in school or in any other endeavor. For that reason, another part of the UI is our [different views of data](): Pipeliner View, List View, Map View, Bubble Chart View, Map View and Compact View. Offering different views is another feature you won't find anywhere else.

The future of data not only means that we need to have correct data, but that this data is visualized correctly. Even when data is correct, if it is visualized incorrectly—such as in a big mass of text—the user can make incorrect assumptions. Visualization speaks 60,000 times faster than text.

Allowing the user different data views, along with the power panel, makes for user efficiency.

The 5 Modules



Layer #2

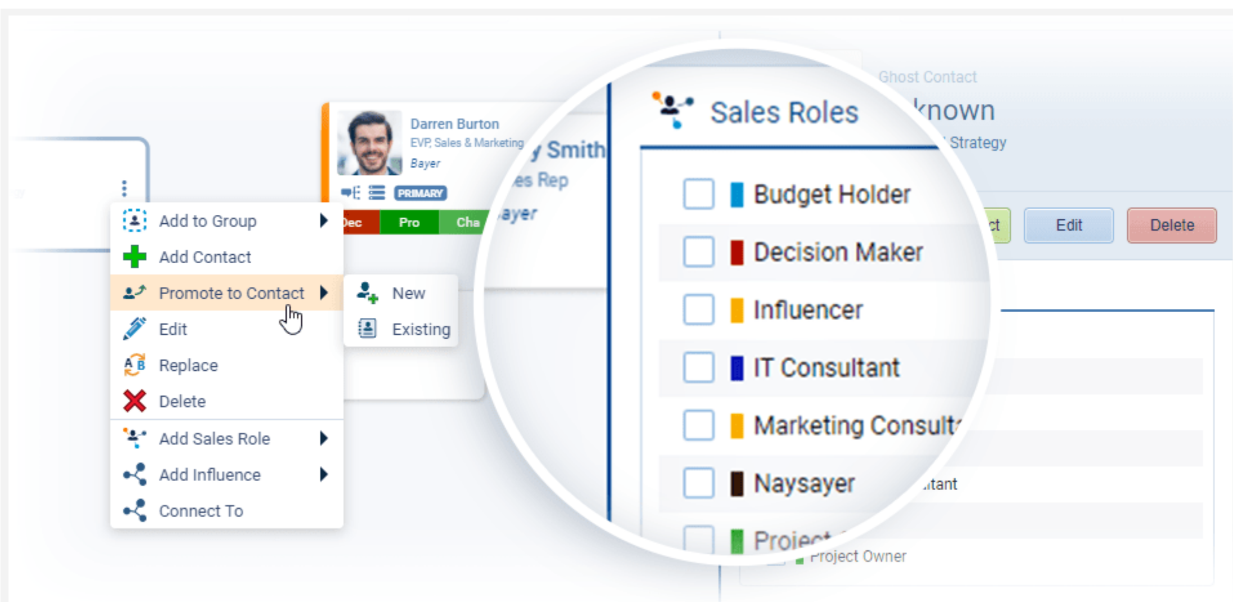
The 5 Modules

Another Pipeliner CRM first is our combining of 5 essential modules so that they can be seamlessly utilized within the CRM. These modules are the Project Engine, Key Account Management, Reporting Engine, Analytics Engine and Sales Force Automation.

Sales Force Automation

Sales Force Automation includes Lead and Pipeline Management, Contact Management, Buying Center and Archive.

Sales lead management describes the overall lead qualification process by which potential customers are identified, educated, engaged, qualified, and passed on to sales to be converted into sales opportunities. Pipeliner allows you to use your buyer's profile to qualify leads and lead sources so that you obtain maximum ROI for your leads.



Sales Pipeline Management allows you to manage activities at key stages, measure what gets done and ensure the team stays focused on achieving the best possible sales results. Powerful pipeline management tracks the individual sales stages salespeople take from initial contact with a potential customer, or prospect, to qualifying that prospect into a lead, then further validating that lead into a sales opportunity and then on through a company's unique stages until closed.

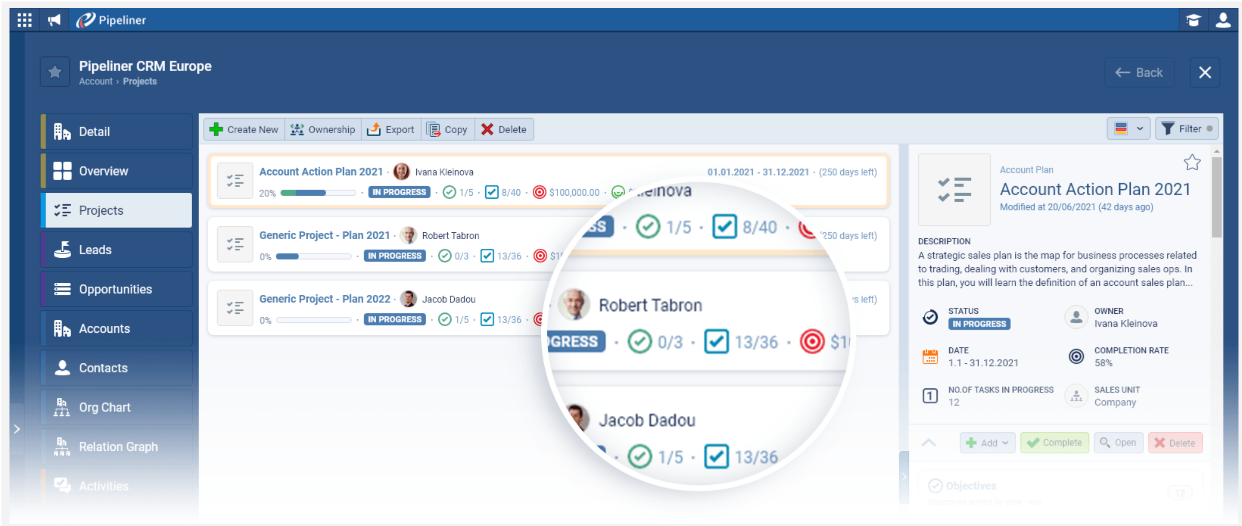
Contact management within Pipeliner goes well beyond ordinary contact management—it is totally visual and dynamic. Pipeliner has made it as easy as possible to locate the information you're looking for. From the account view, you can readily see all associated contacts and opportunities. From opportunities, 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.

The Buying Center displays relationships for individual opportunities. For each opportunity, the salesperson can visually lay out all the relationships related to a particular opportunity, and how they influence that opportunity.

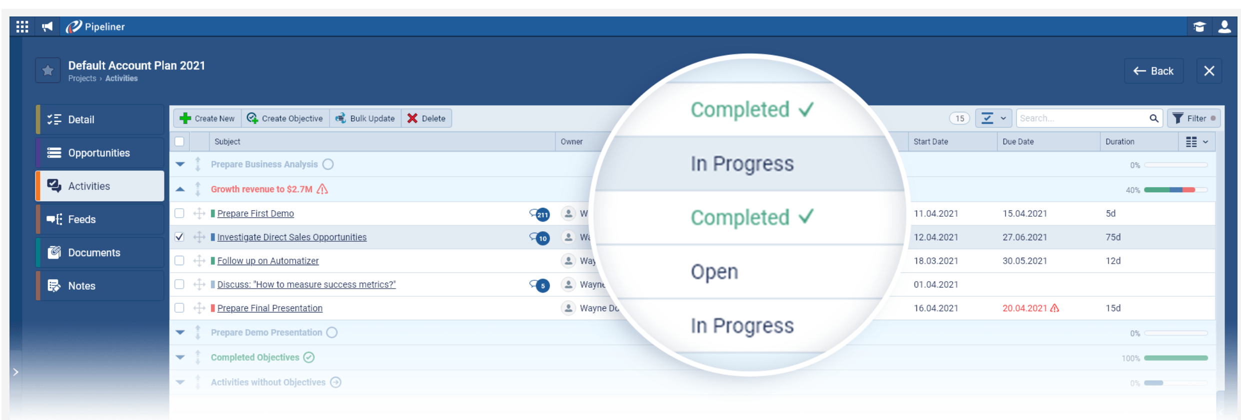
The [Pipeliner CRM Archive](#) tool—totally unique in the CRM market—allows you to view archived leads and opportunities, with all information present at the time they were archived, including documents, emails, notes, social media interactions, tasks, and activities. Leads and opportunities can be restored to the active pipeline with 1 click, plus analysis can be conducted of lost opportunities.

Project Engine

At Pipeliner, we have created a project management tool that is part of our CRM. This tool is highly beneficial for our customers, as it not only applies to account management, but can be applied to project management in general.



Numerous components of project management are part of this tool. First of all, when creating a **project**, there are documents involved, used for marketing, as checklists, as content, and for many other purposes. These documents must be accessible to anyone involved in the project or even those reviewing it.

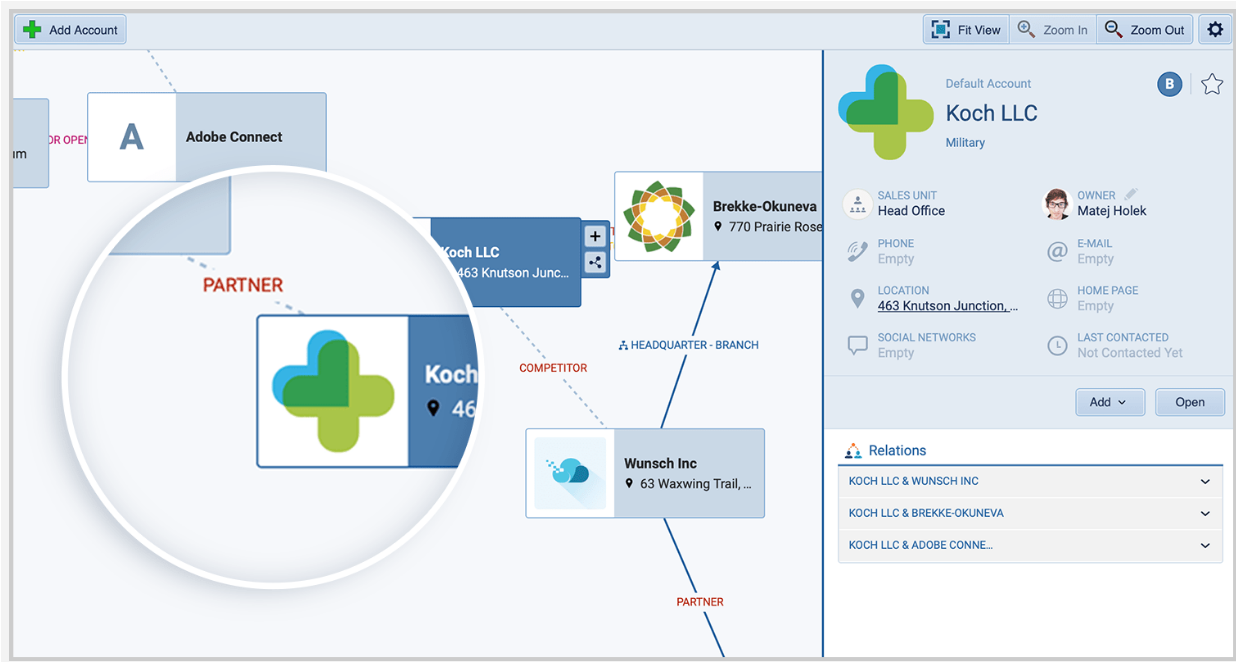


Another part is **tasks and appointments**. Tasks can be reoccurring—for example, you might want to revisit the team periodically to bring everyone up to date, and to ensure the project is running smoothly. Another factor is the setting of **objectives**. Each objective has an associated list of tasks that, when completed, equal the completion of that objective.

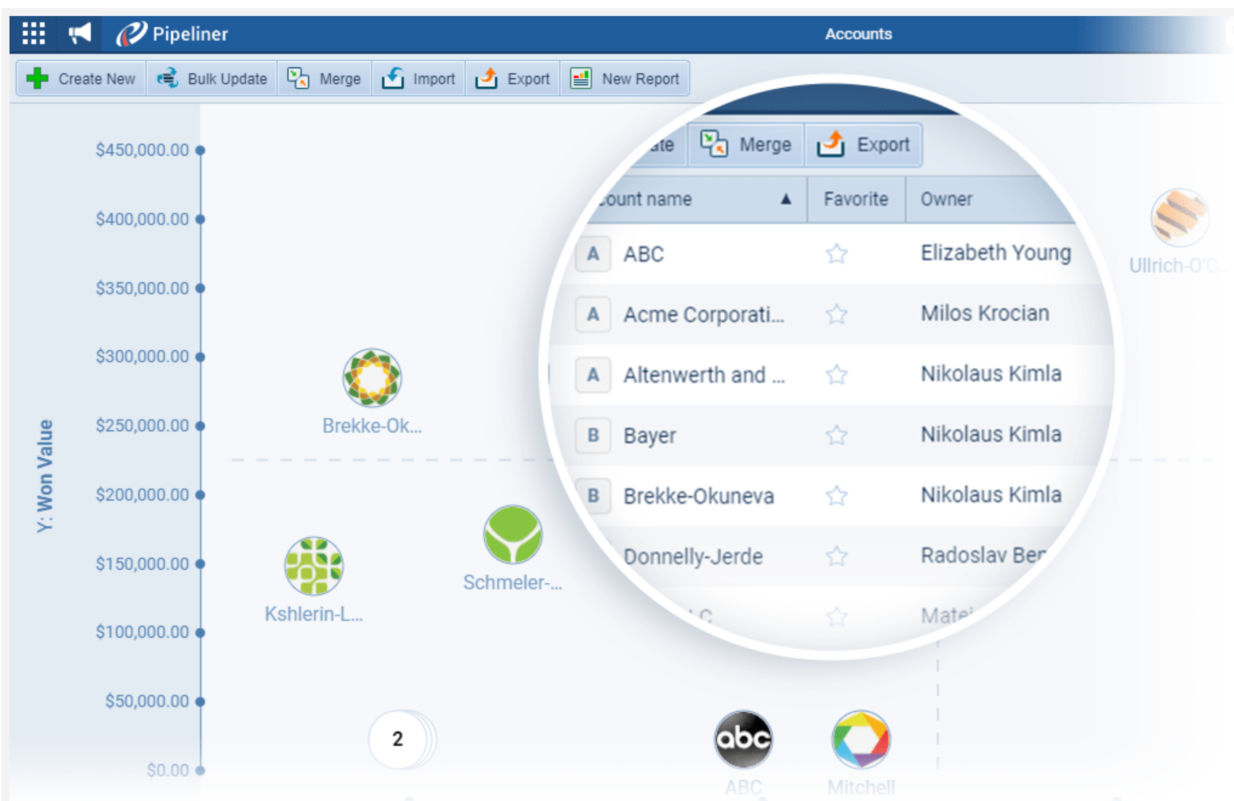
Key Account Management

Key Account Management consists of four primary features: Relationship Maps, Account Matrix, White Space and Org Charts.

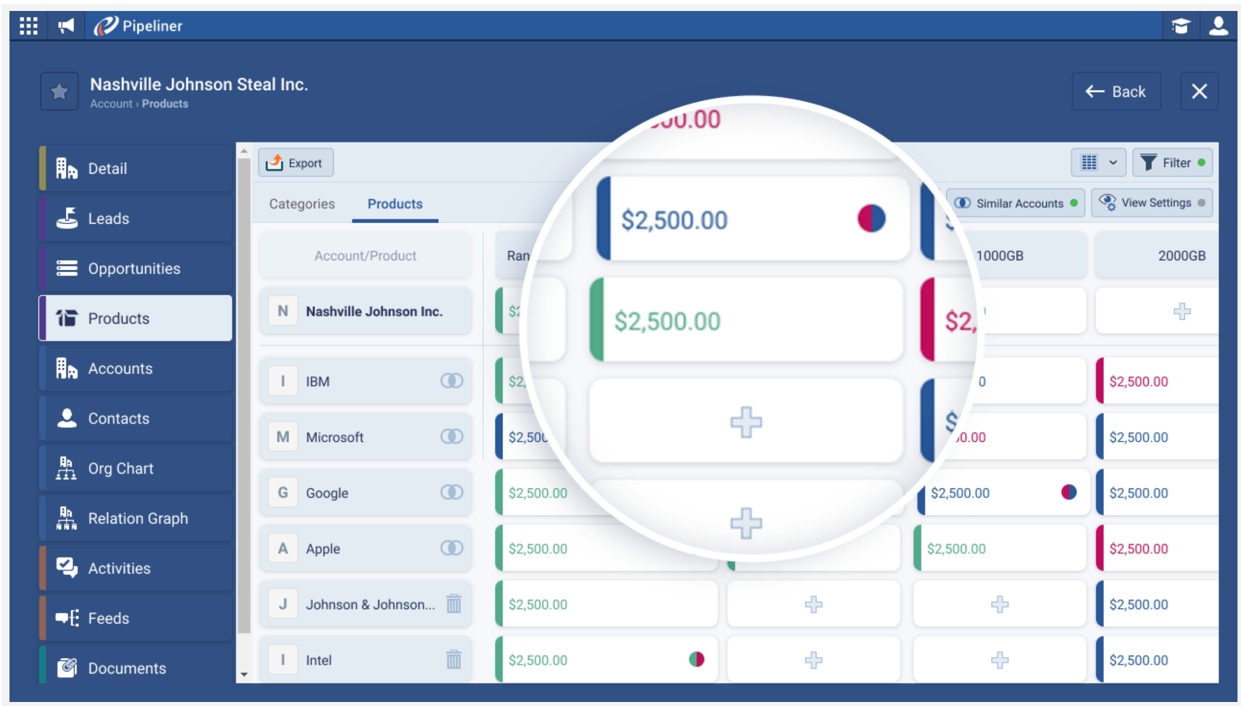
The Relation Map gives you an additional level of understanding of the relationships between account records and contact records, by allowing you to map networks and relationships that you need to be aware of.



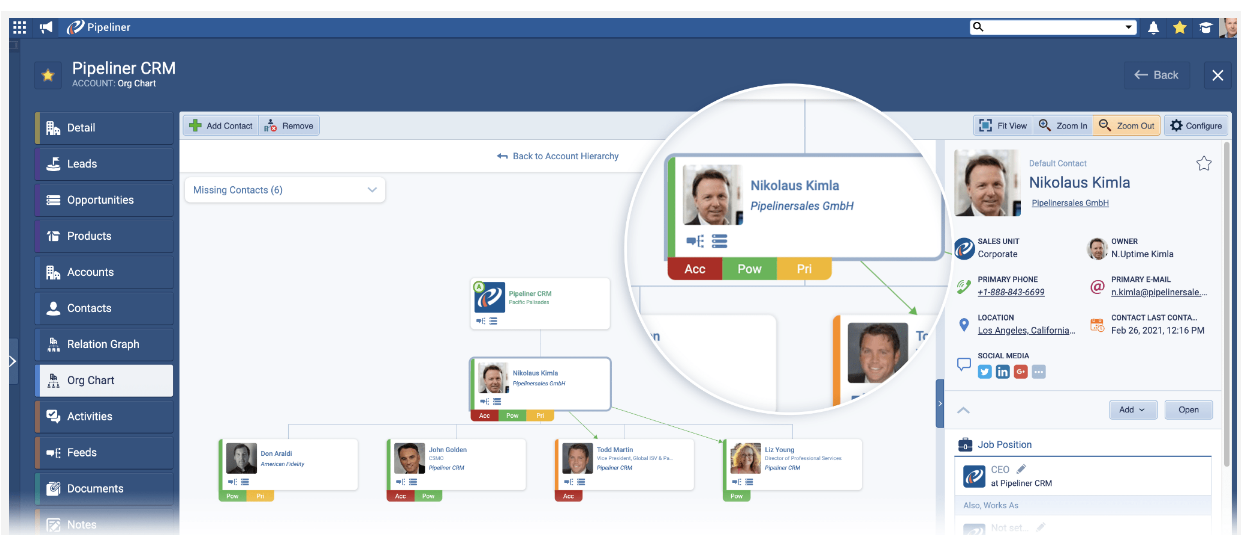
The Account Matrix is invaluable for Account Management, allowing the user to visualize key metrics for building and maintaining effective relationships.



White Space functionality allows you to examine your top customers, with regard to products or services you have sold to them and numerous other factors. Data can then be utilized in graphs. With this kind of detailed visual information, you can then begin to formulate real account management strategies.



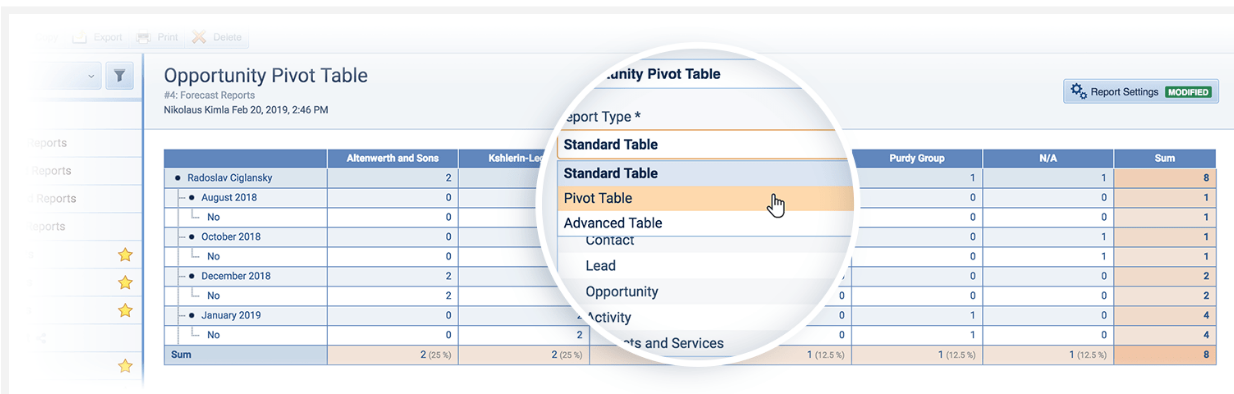
The Org Chart allows you to visually display the hierarchy within an account. You can label each individual's card with details such as that person's role, their attitude toward your product or service, and their place in the company hierarchy.



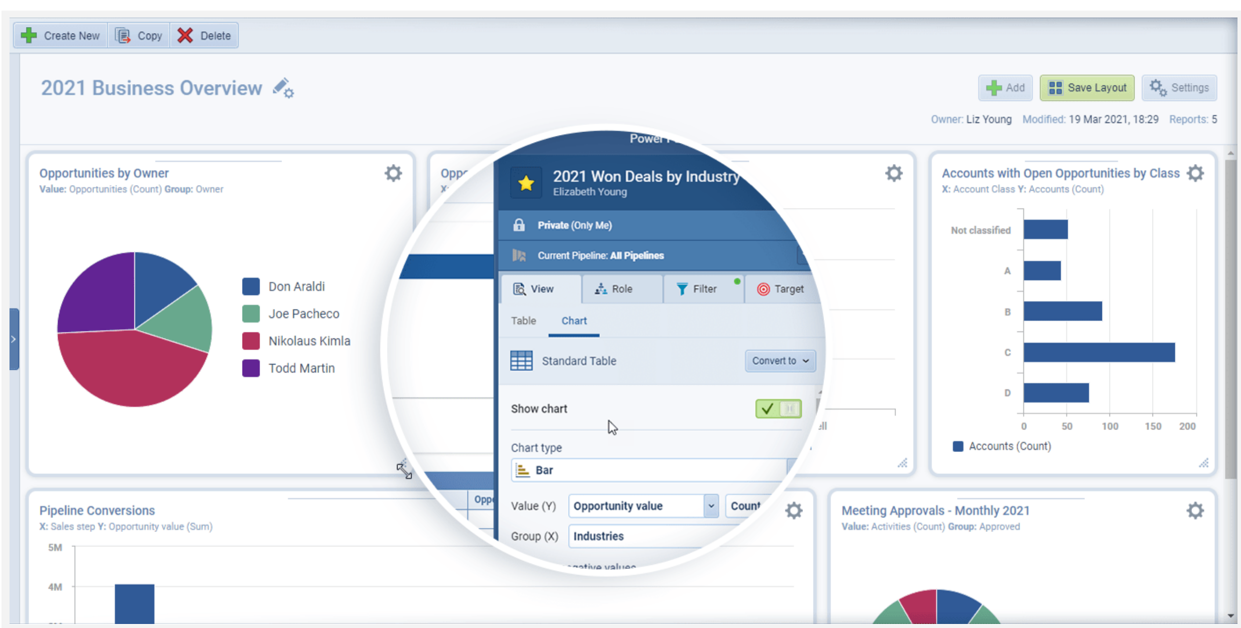
Reporting Engine

The [Reporting Engine](#) includes CRM reporting functionality found nowhere else, including pivot tables, dashboards, forecast and quota, and advanced reporting.

Pivot tables allow you to drill down into, and generate custom sales reports from, multiple data sources. Pivot Tables are easy to use, with a graphical interface enabling the user create relevant reports in real time without leaving the screen.

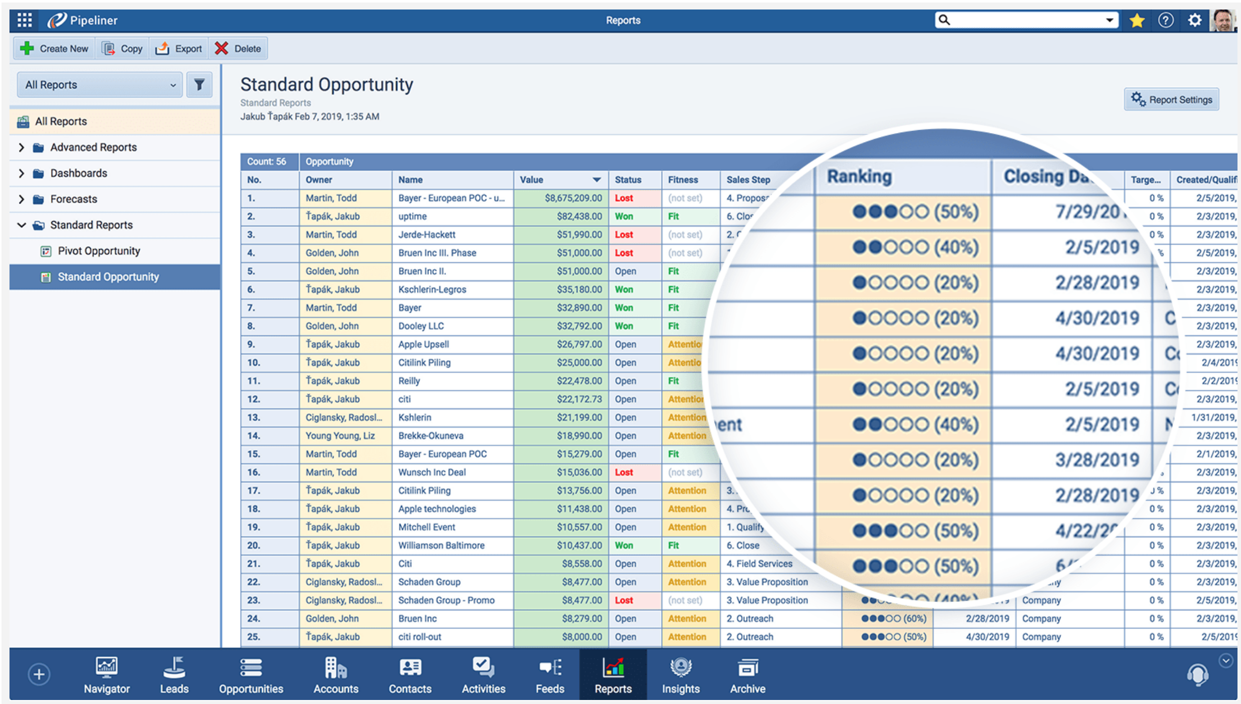


Dashboards display many different data types in an easy-to-assimilate visual format. Pipeliner CRM offers many different dashboard reports for understanding and analyzing CRM data.



Pipeliner CRM's quota tool utilizes the underlying sales figures of what has been won in the past, so you know what can be forecast with some reality. With our forecasting tool, we aim to bring enterprise-level forecast accuracy to everyone.

[Advanced Reporting](#)allows you to combine any record type (opportunities, leads, accounts, contacts, products, feeds, notes, activities) or report type (standard or pivot) into one single report. In the past, creating advanced reports of this type was complex and had a steep learning curve. Pipeliner is all about simplifying complexity—as found in the field of cybernetics—and Advanced Reporting is a prime example of this functionality.

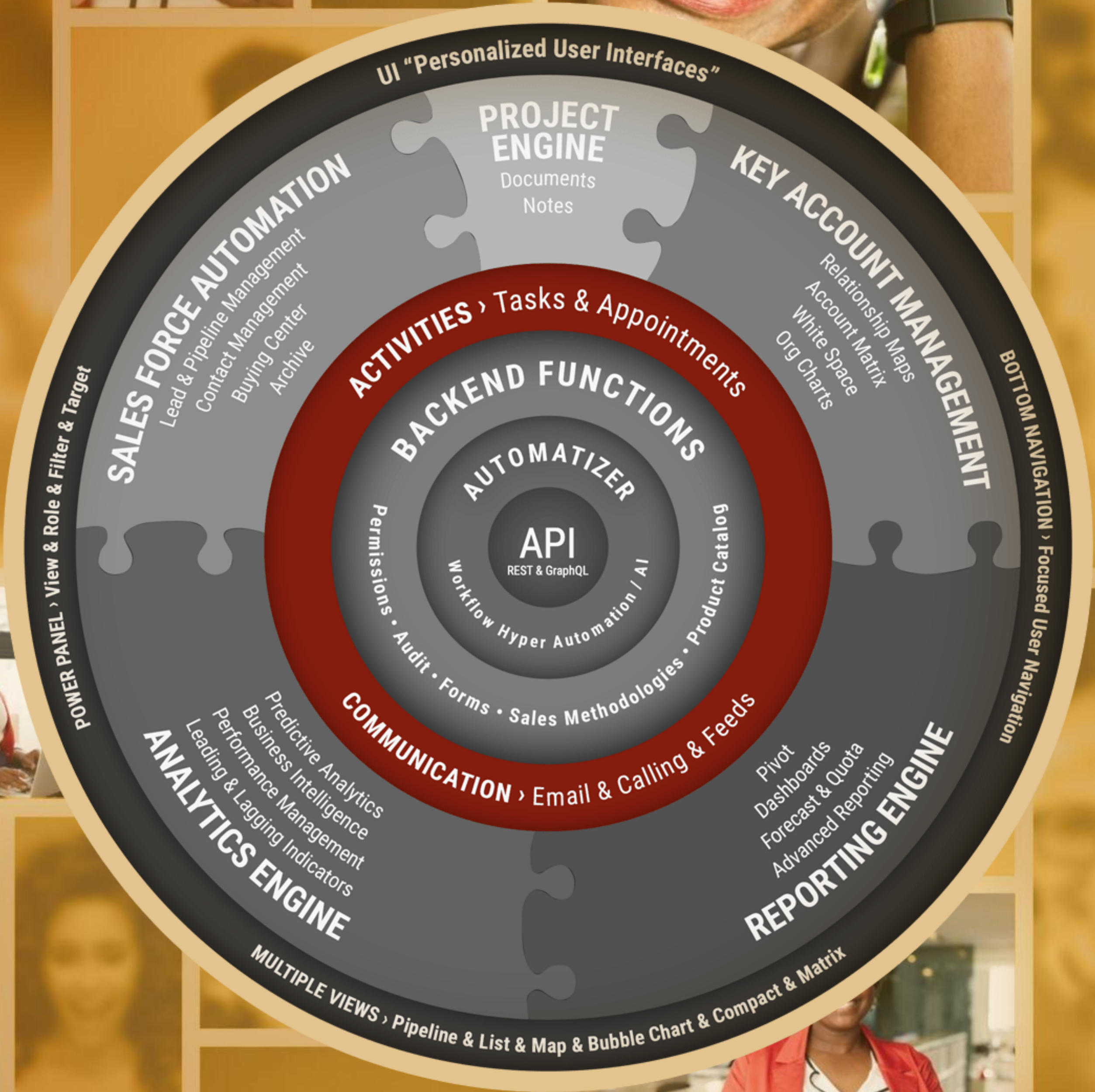


Analytics Engine

Pipeliner CRM analytics allow you to analyze, with KPIs, virtually any aspect of account management. As an example, figure out how many of your top account class customers you have created. How many have you won? How much revenue have you obtained from that account class? From the totals, you can then dive into particulars of the data, such as drilling down into specific clients.


Pipeliner
Insights
Insights
Indicators
Conversions
Performance NEW
Show users results
Show units results
Show my results
All Users
Direct Sales
Don Araldi
$500,850.00
100%
Creations
45
33% vs. 1st
28
Created Leads
17
Created Opportunities
Conversions
162
48% vs. 1st
116
Qualified Leads
46
Won Opportunities
Losses
298
194
Lost Leads
104
Lost Opportunities
Won Amount
$500,850.00
100%
Lost Amount
$994,838.50
27% vs. All
Lost Amount
Qualified Leads
Won Opportunities
Won Amount
Created Opportunities
Highlights
Navigator
Leads
Opportunities
Accounts
Contacts
Activities
Feeds
Analytics
Archive
Tools

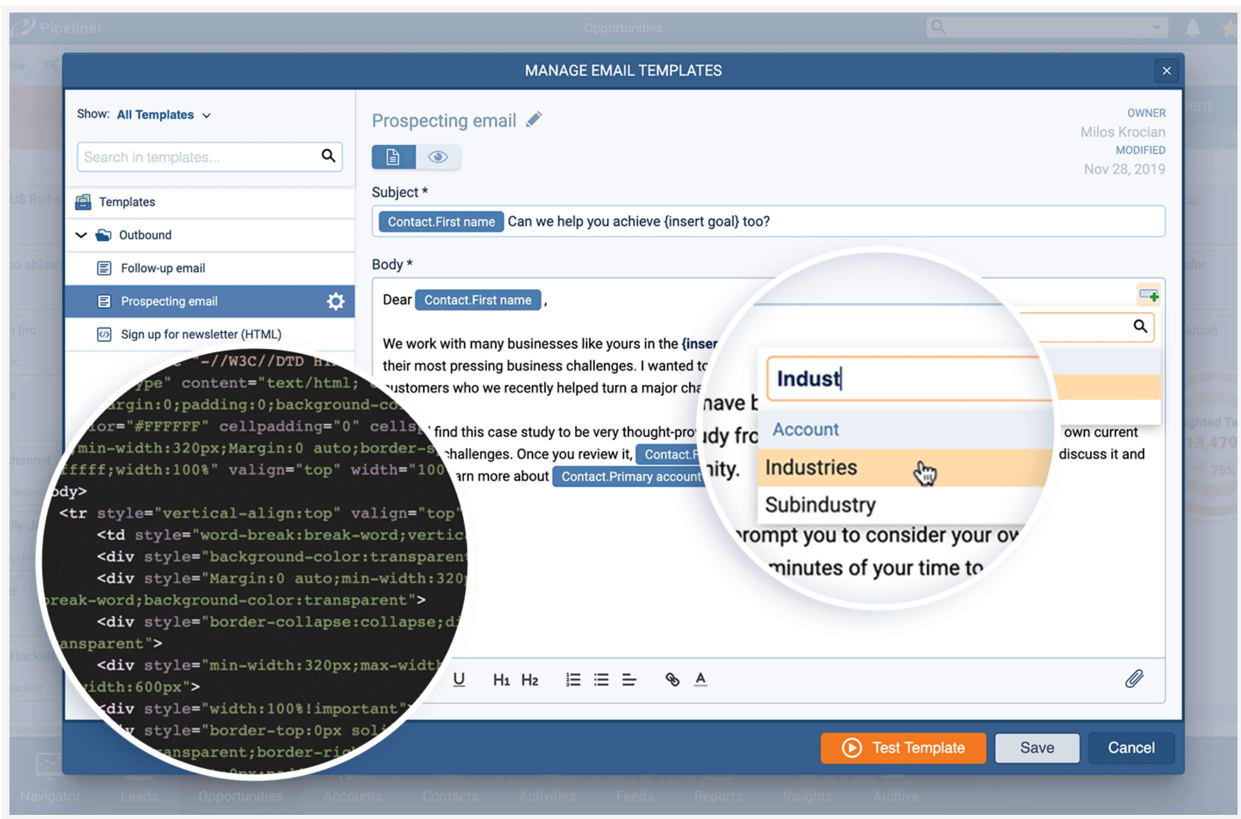
Activities and Communication



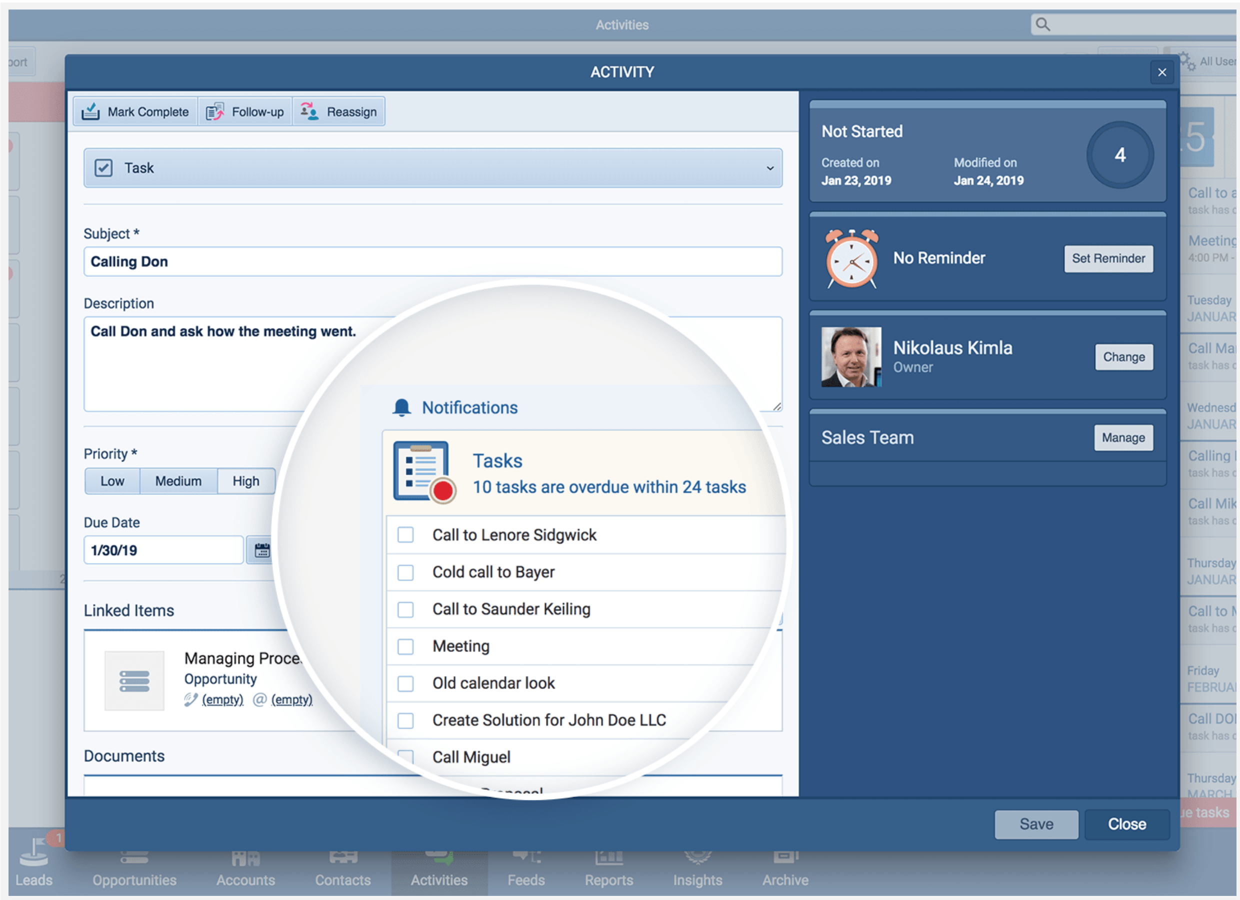
Layer #3

Activities and Communication

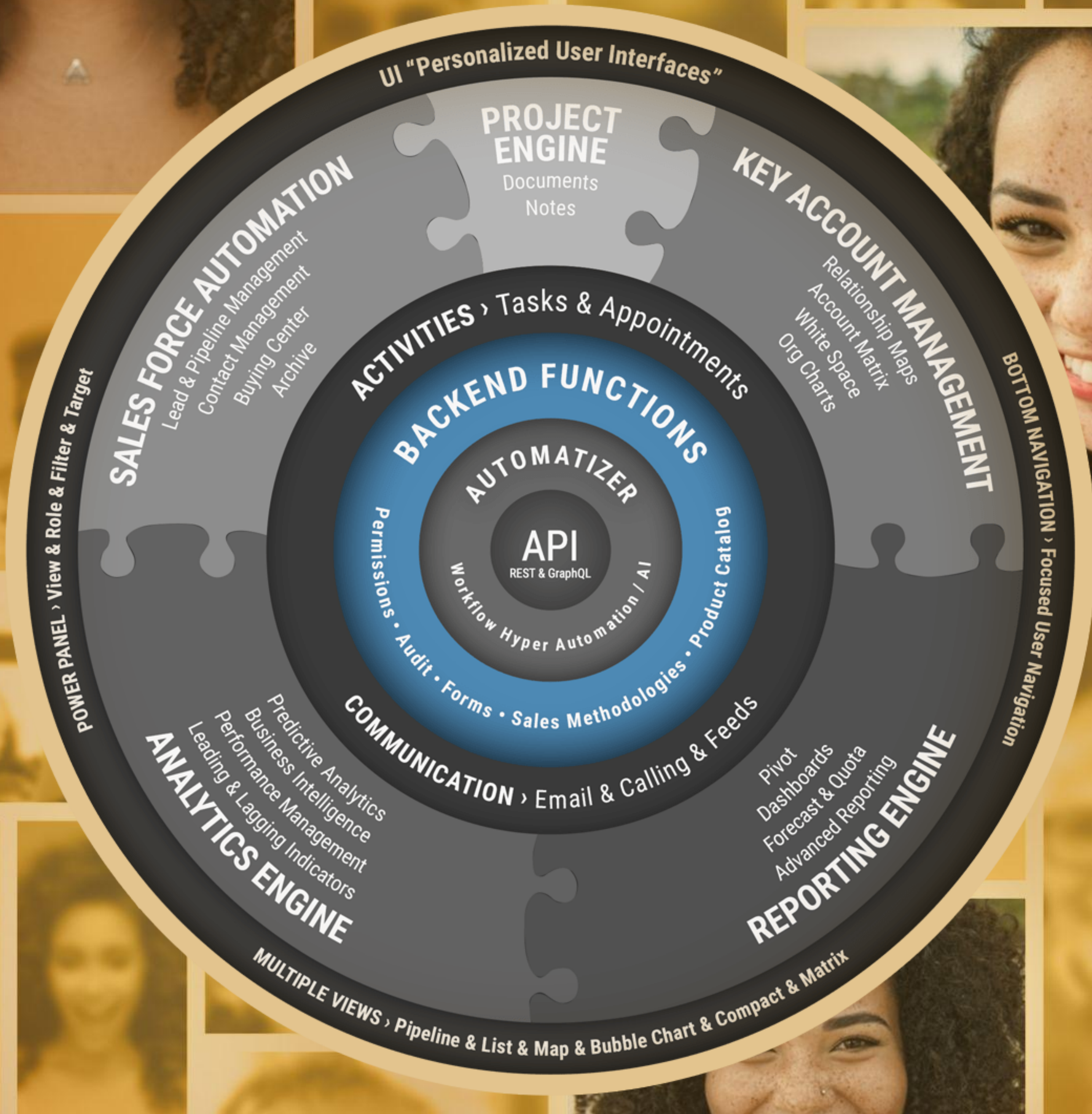
All actions through an application such as Pipeliner CRM occur through communication. For our purposes, there are 3 primary forms of communication: email, calling (through phone or video communication), and the feeds within Pipeliner that consistently show the user communication to and from prospects and customers, and between team members.



Communication is all about the activities taking place, through [tasks and appointments](). Appointments in Pipeliner are meetings you have with your prospective or current clients. They have a date and time that they begin and end. Because of this, when you schedule an appointment, Pipeliner will recognize when you have completed that Activity based on the date and time it is set to end.



Backend Administrative Functions



Layer #4

Backend Administrative Functions

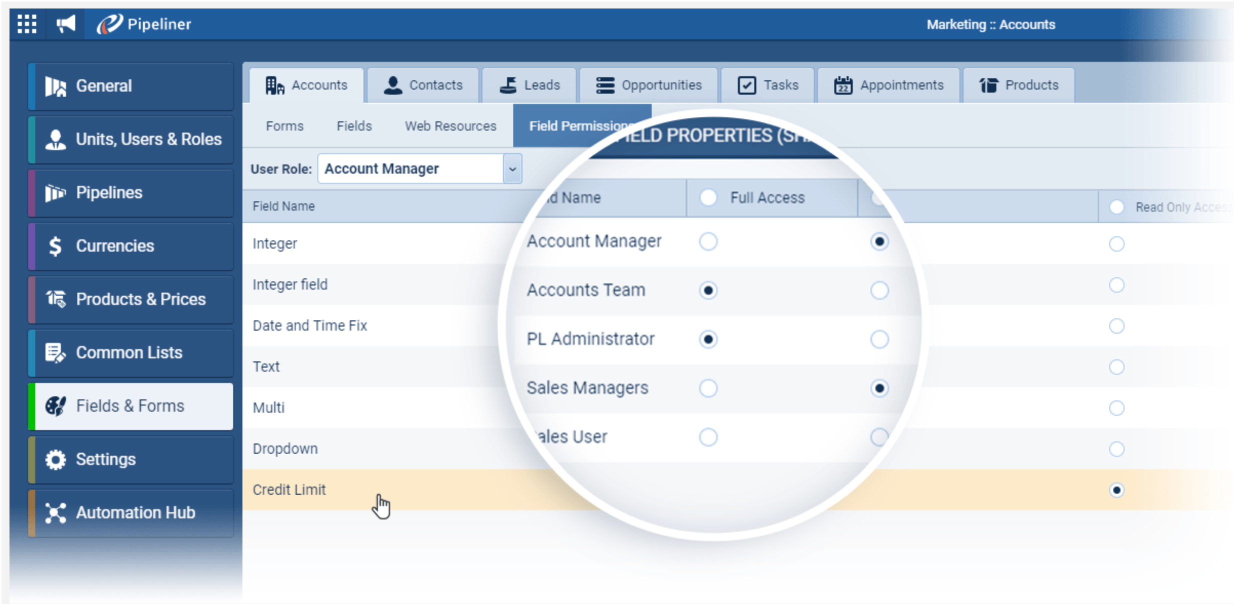
The next layer in is our backend administrative functions.

We always like to point out that it took us 4 years to program our administrative functions. Why so long? We did this so that it would be easy for companies to utilize their own personnel for administration. Pipeliner is the only robust CRM not to require a highly trained administrator—or, in cases of traditional complex CRMs, requiring to have a paid outside consultant "sit on your lap." Any computer-literate person can learn Pipeliner CRM administration in a few hours.

This kind of backend administration really strengthens your independence. Your company no longer has to depend on particular individuals. If a CRM administrator happens to suddenly leave the company, you can train someone else within hours.

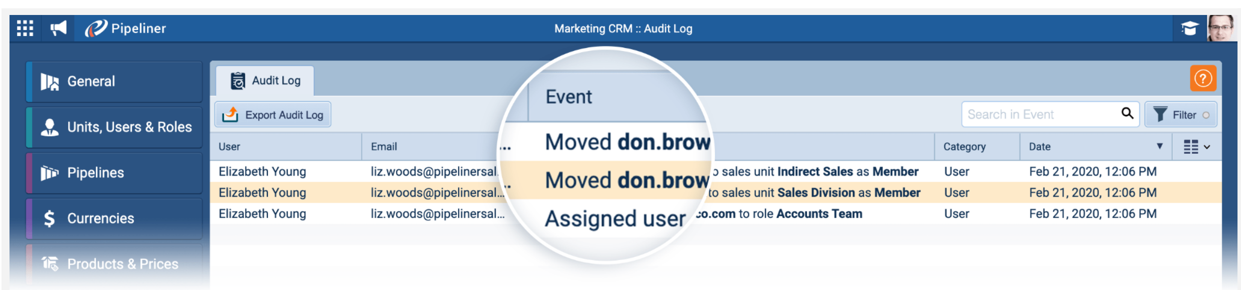
Permissions

Administration includes all areas of permissions, for sales units, roles, users, field-level security, and all other security factors.



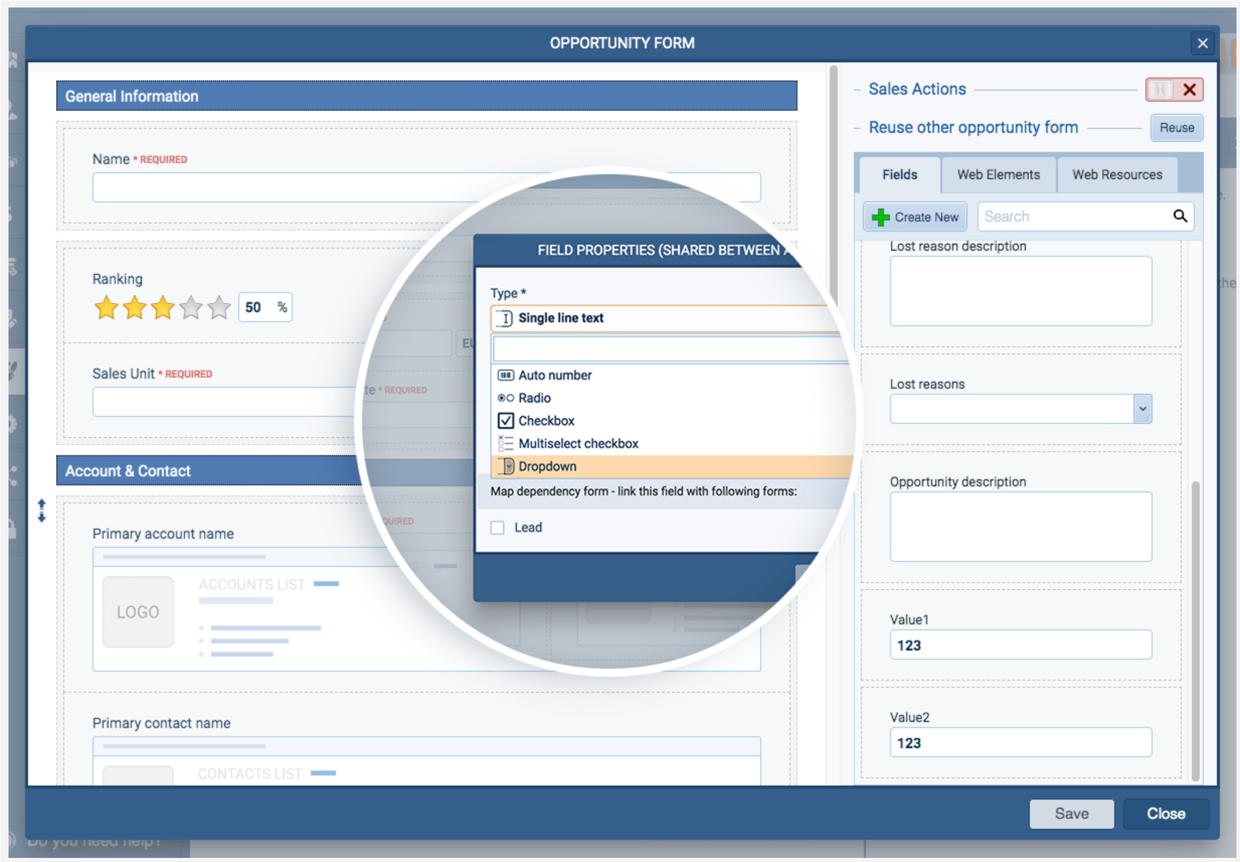
Audit

[The Pipeliner Audit function](#) allows you to monitor any changes that have been made within the application, and by whom. It is especially important in a legal case to obtain data such as who last accessed the application.



Forms

[A form](#) is what you see when you create any new record or edit an existing record. A form includes a combination of system fields and custom (or user-defined) fields that you can choose to add. The easy drag-and-drop functionality applied to our front end has also been applied to our back end administration.

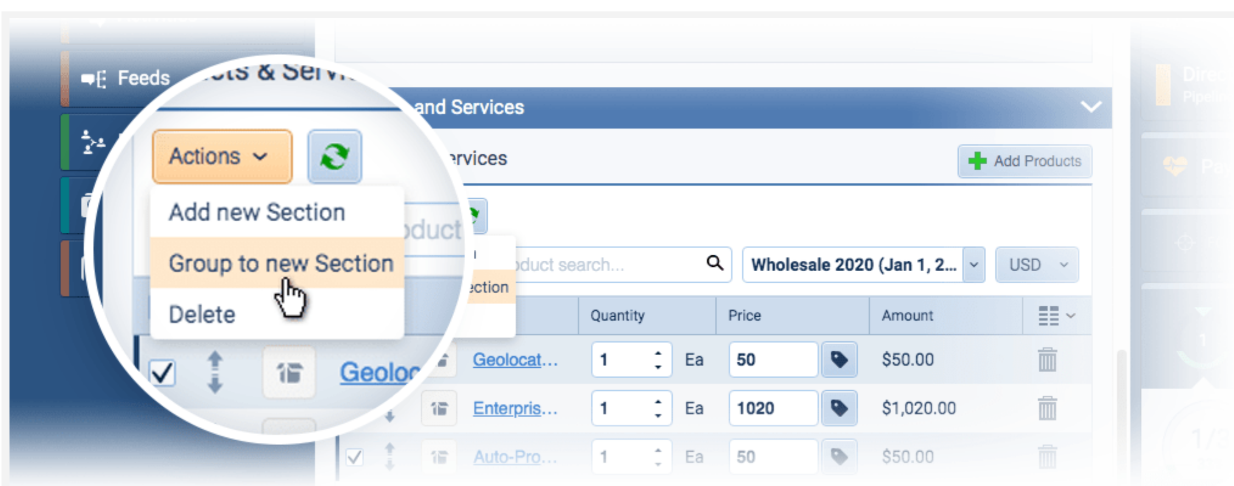


Sales Methodologies

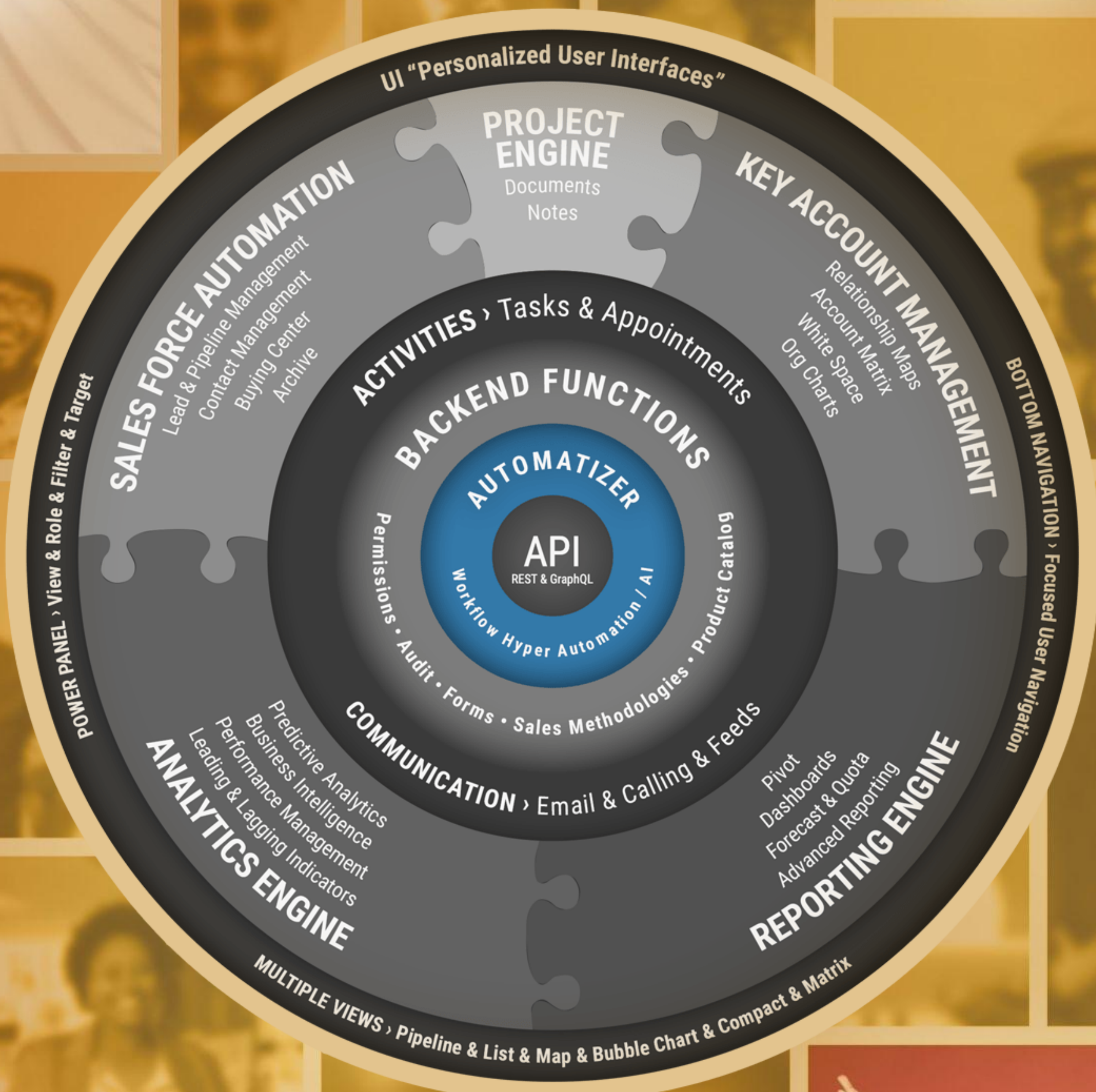
Within each stage of the sales process, activities the seller needs to complete, and [actions the buyer needs to take, can be set](). This provides a defined path for each salesperson to follow and eliminates inconsistency. These can even be made mandatory before an opportunity can progress. This is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

Product Catalogue

With Pipeliner's Product Catalogue feature, along with product line item functionality, you can add the products and services offered by your company to Pipeliner. Your team can select the products, quantities, and pricing for their particular opportunities, and even add specific custom information against each selected product or service. If you so choose, Pipeliner can then sum the value of the products or services selected and update the total value of the opportunity in question.



The Automatizer



Layer #5

The Automatizer

Pipeliner CRM's totally unique Automatizer workflow tool allows you to use conditions and triggers to automate many routine and repetitive tasks that slow down and impact the sales cycle. No coding needed—use the point-and-click interface to build processes. Automatizer works with third-party integrations as well as Pipeliner CRM.

The Automatizer is, in fact, the hub of our CRM wheel. Operating CRM without the Automatizer is like trying to run a car without an engine--you won't get very far!

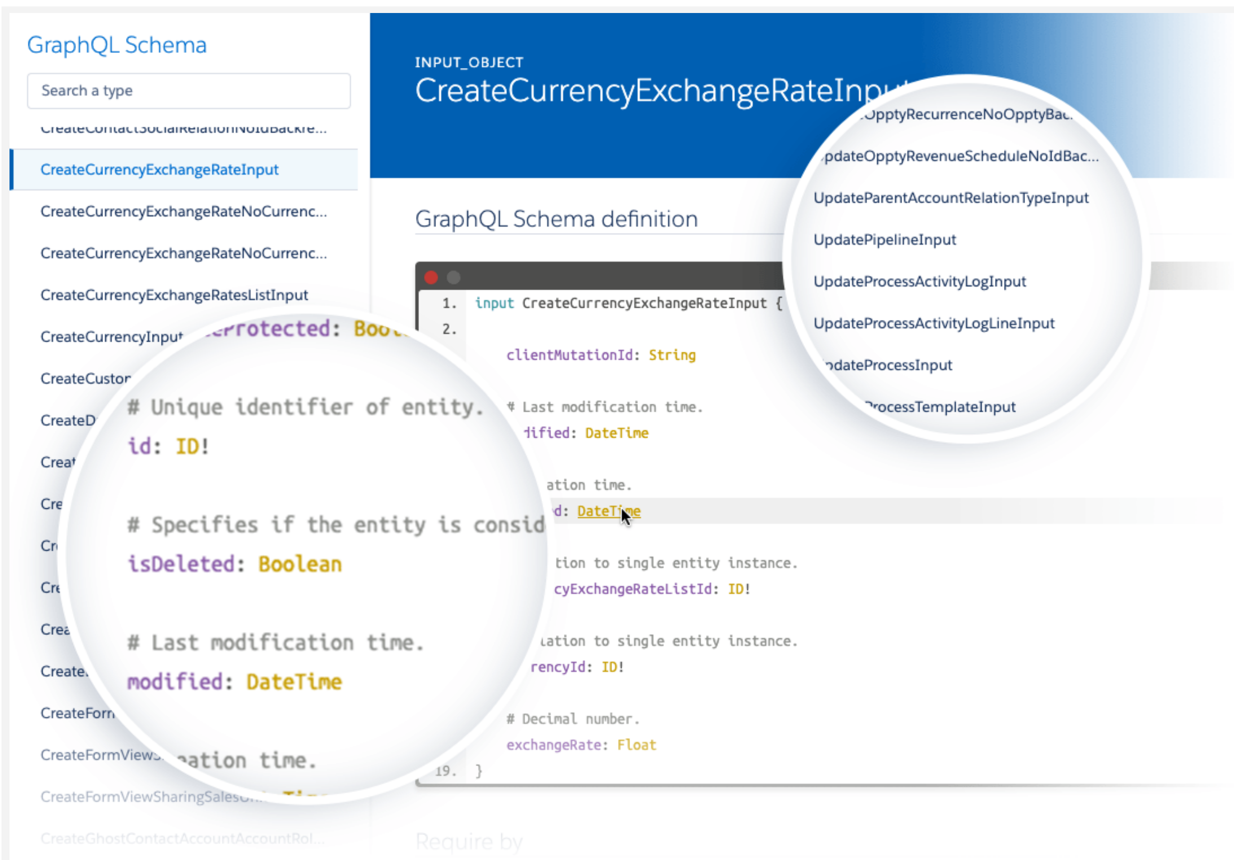
API

UI "Personalized User Interfaces"
PROJECT ENGINE
Documents
Notes
KEY ACCOUNT MANAGEMENT
Relationship Maps
Account Matrix
White Space
Org Charts
BOTTOM NAVIGATION › Focused User Navigation
REPORTING ENGINE
Pivot
Dashboards
Forecast & Quota
Advanced Reporting
MULTIPLE VIEWS › Pipeline & List & Map & Bubble Chart & Compact & Matrix
ANALYTICS ENGINE
Predictive Analytics
Business Intelligence
Performance Management
Leading & Lagging Indicators
POWER PANEL › View & Role & Filter & Target
SALES FORCE AUTOMATION
Lead & Pipeline Management
Contact Management
Buying Center
Archive
ACTIVITIES › Tasks & Appointments
BACKEND FUNCTIONS
Permissions • Audit • Forms • Sales Methodologies • Product Catalog
COMMUNICATION › Email & Calling & Feeds
AUTOMATIZER
Workflow Hyper Automation / AI
API
REST & GraphQL

Layer #6

API

The inside layer is the API layer, vitally important for today's integration of processes. For companies that are utilizing it, we offer **Facebook's bi-directional API**, **GraphQL**. We also offer the widely used **REST API**.



[Our API offerings are open source](), and for that reason very well documented and accessible. They are also very easy to use—no need to be a senior programmer.

The Next Level

Our approach raises CRM to a whole new level, which we believe should have been there for years.

The majority of CRM vendors today concentrate primarily on technical implementation. But we believe—and have demonstrated through our product and its incredible ease of use—that technical implementation should be easy. Companies should be able to utilize technology with little to no effort, and instead be able to put their full concentration on their business process focus, which is different for each business and business type.

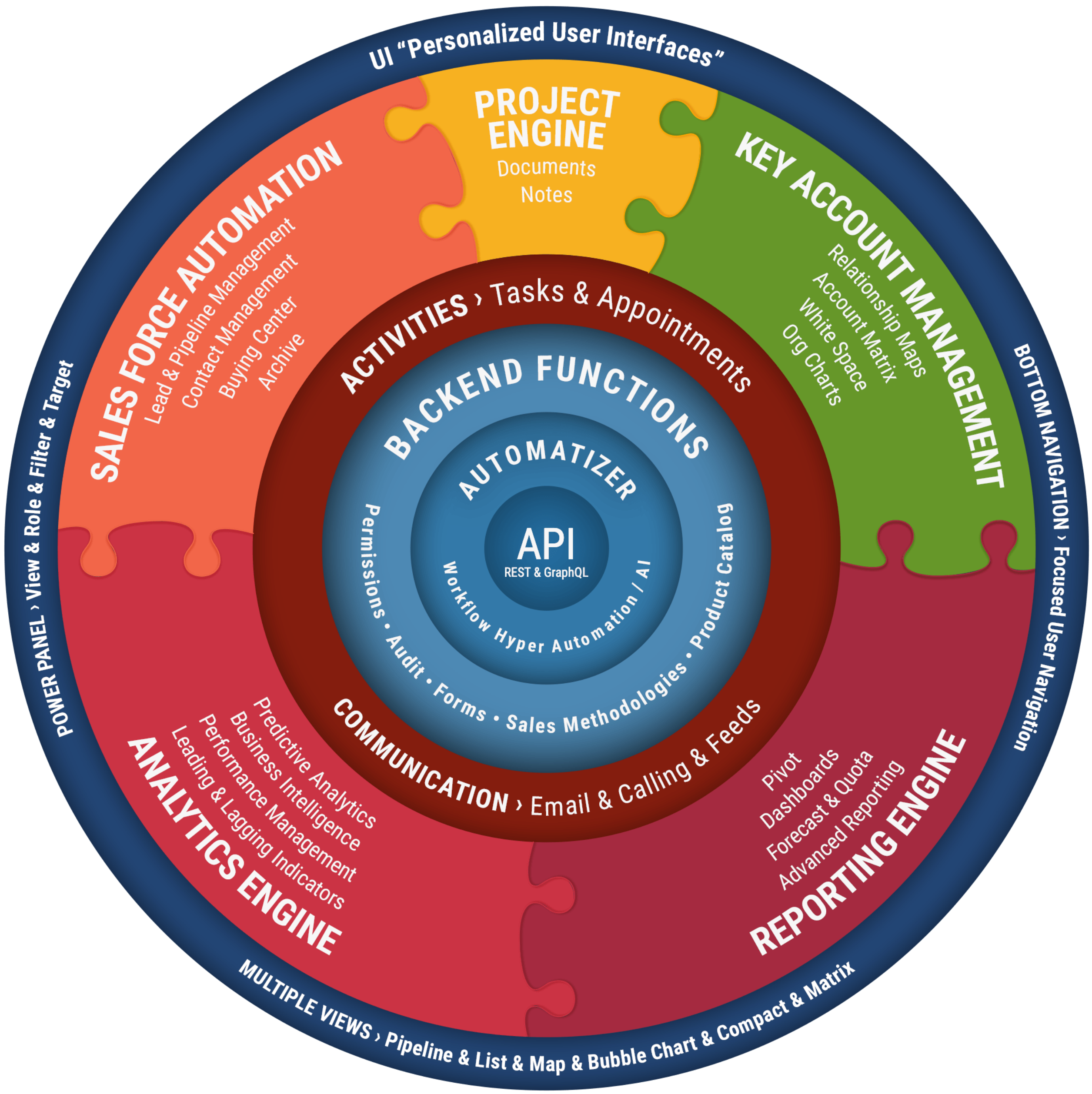
While we don't require consultants for our CRM, we would point out that a qualified consultant might be very valuable for some business processes.

What are the business challenges of the future?

We believe they fall under 3 main topics:

1. **Business is constantly changing.** You need to be flexible.
2. **You need to react almost instantly with this flexibility**—which means you have no time to be waiting for your CRM application. With a traditional CRM, you could be waiting days for a CRM expert to come and help you, while you lose business. But if you've got the technology right in your own hands, which you do with Pipeliner CRM, you continue to win.
3. **If for some reason you lose your CRM administrator**, it can be a real problem with traditional CRMs that require experts. With Pipeliner, however, it's no issue as a new administrator can be trained up in a few hours. You can continue to address and solve your business issues.

What really takes time to learn, and what you really need to be concentrating on, is how your business operates. We provide easy to use technology to allow you to do that—as you can see in the Pipeliner CRM Revenue Wheel.



Pipeliner CRM

Exceptional Engagement

The Better CRM › Built for Sales, Used by Sales!

TRY IT FREE

or

FIND OUT MORE