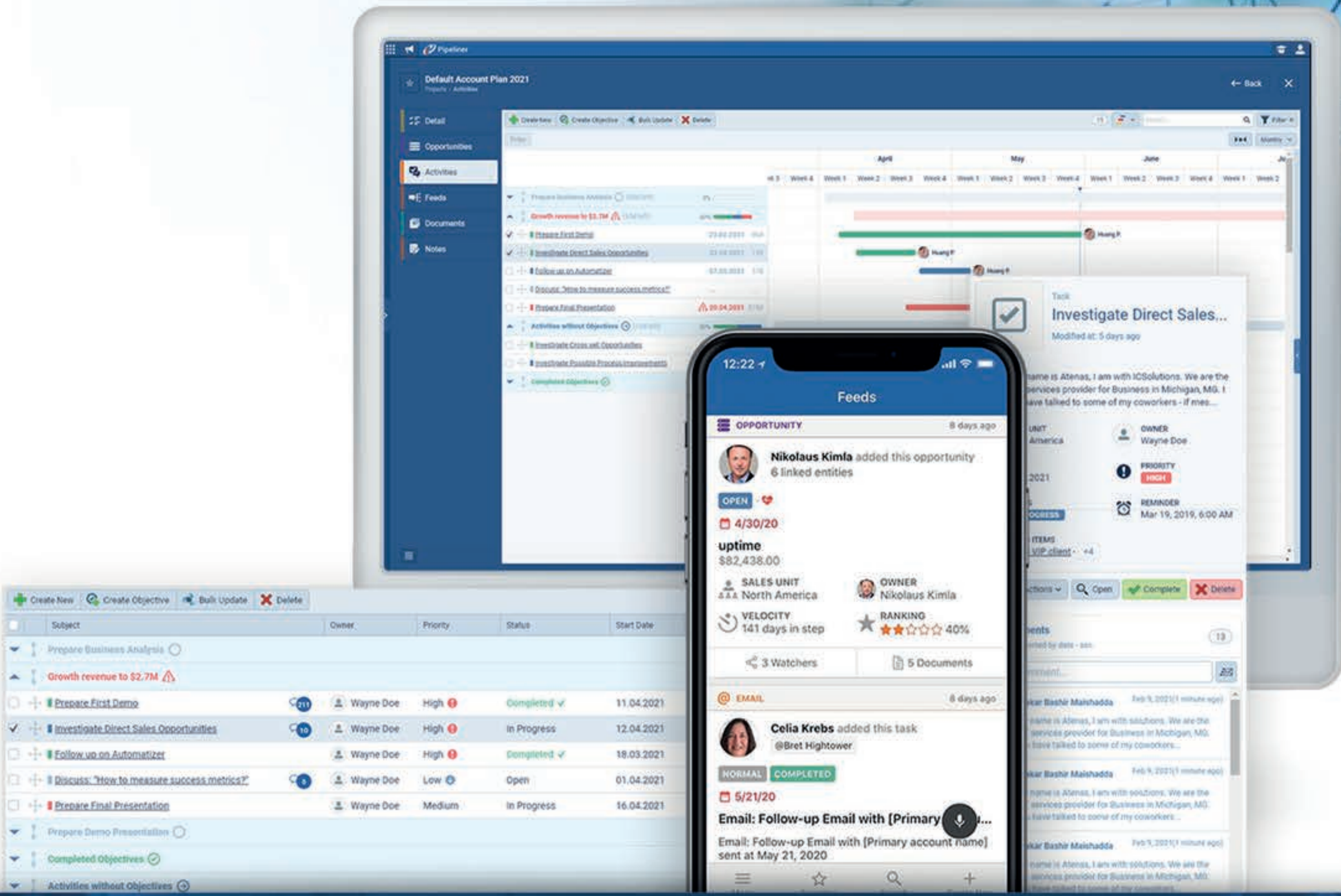

Pipeliner CRM

THE CONCEPTS BEHIND THE FEATURES

by Nikolaus Kimla

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INTRODUCTION

The understanding of Pipeliner CRM features must go well beyond simple, functional explanations. Just understanding mechanical functionality doesn't necessarily mean you'll really grasp the product and all that it means, which is why I'm now writing this ebook on the concepts behind Pipeliner CRM functionality.

To begin with, there are three distinctly different types of Pipeliner users, who all require different approaches. Let's first clearly define these different types.

Salespeople and the Regular User

The regular Pipeliner user is usually the salesperson, and sometimes some other specialized users such as accounts receivable. There are several ways the basic user can learn about Pipeliner—from training, from our YouTube videos, and the extensive help functionality available in the program. For a user to learn Pipeliner is a matter of hours instead of the days, weeks or months that other CRM applications require.

A crucial aspect that sets Pipeliner apart from any other CRM is the fact that users love it...and what you love, you use! This love is down to Pipeliner's totally visual approach—in fact, Pipeliner is the most visual CRM in the world. In that the mind perceives pictures 60,000 times faster than words, this makes for a much faster operation as well. Because users happily and fully interact with Pipeliner, they enter complete data, and sales management actually gets the information they need from CRM.

HUMANS LOVE GOOD VISUALS

90% of the information transmitted to the brain is **visual**

80% of people remember what they **see**

Visuals processed 60,000 times faster than text

92% of all human communication is **non-verbal**

40% of people respond better to **visual** information than text

Pipeliner has a clear, unified navigation system, also based on our totally visual approach. Our user interface is not only state-of-the-art, but elegant, slick and clean. The navigation system is the frame that holds and unifies the entire picture.

When needed, we support the user through chat, our Pipeliner community, our help support website and the extensive help embedded in the program. These are all available through the “graduation cap” symbol in the program.

One necessary prerequisite to user training is the complete setup of the application within the user’s company. By setup, we mean full customization and all other things needed for Pipeliner to fully back up that particular organization. Otherwise users won’t be training on the application, but simply on features without relating them to the user’s company and products.

When setup is correctly done, user adoption rate is very high—again, unlike many other CRM products, especially the traditional enormous ones. **Here is what our users think**.

Advanced User

Also part of the user category is advanced users. These would include sales and other managers who oversee other users, and C-level executives. These generally need to have access to advanced reporting, insights and statistics.

What sets the advanced users apart from the regular user is that they not only need to view their own data, but data from other users as well. Therefore the advanced user will want to learn all about Pipeliner’s advanced filtering and profiling capabilities, so that data can be rapidly viewed in the exact way they need to see it, and utilized within advanced reporting.

These advanced features are not complicated, and advanced users will require them.

Specialized roles might only need certain features, and we can target training for particular roles when required.

Administrators

We have two distinctly different types of administrators. The first is the one people would typically think of—the administrator who enables needed features to the product when requested, adds new users, provides user support, and enables customized fields and other similar tasks. With traditional CRM applications, even these everyday administrative functions would require weeks or months of learning. It took us many years of programming, but we finally arrived at the point that regular Pipeliner administration can be learned by any computer-literate person within a few hours. That means that the "CRM expert" or consultant previously required for CRM administration is no longer needed.

Beyond that, this first type of administration is not a fulltime job—it normally requires a few hours per month. This saves the company a whole extra salary for the "expert."

The other type of administrator is what we will call the architect administrator. This role operates on more of a conceptual level of the organization's business processes, and should be someone who, right from the beginning, is assisting the company with streamlining processes. They continually find ways to create and streamline those processes within Pipeliner. As an example, the **creation of a rollup field**, and the different factors that would contribute to it. These functions would not only be created for sales—they could very well be anywhere else in the company.

This function could be likened to someone in a factory who creates new functions within the factory so that it functions more efficiently. They analyze the line, and find ways to improve it and make it more effective.

Note that I'm not talking about programming—programming knowledge is not required for Pipeliner. We provide all needed tools for an administrator. Our back-end administration, while consisting of a complete toolset, is simple to learn and operate.

As with the first type of administration, the architect administrator would also not necessarily be a fulltime job. In fact, the two different types of administrators could even be one person, but they're generally not.

In this ebook, I'll be going deeper into the concepts behind these different types of administration, as well as units, roles, and other essential aspects. Stay with us!

CHAPTER 1

Understanding Company Structure

As described in the introduction, we have two different administrator roles—one being the regular administrator and one being the architect administrator. One person might fulfill both roles or, in a larger company, two separate people might be required.

The first thing this architect-administrator has to work out is the company structure. How is it constructed? It could be based geographically—for instance, the company has divisions in Europe, America and Asia. The company could also be divided into various business units, or perhaps by different product types or by type of industry. For example, Pipeliner is divided geographically between Europe, America, Asia and Africa and is also divided between products and services.

If these divisions are not clearly laid out and understood from the beginning, it could make for CRM problems down the road. It will be the basis of what a user—regular or advanced--will be able to view and access.

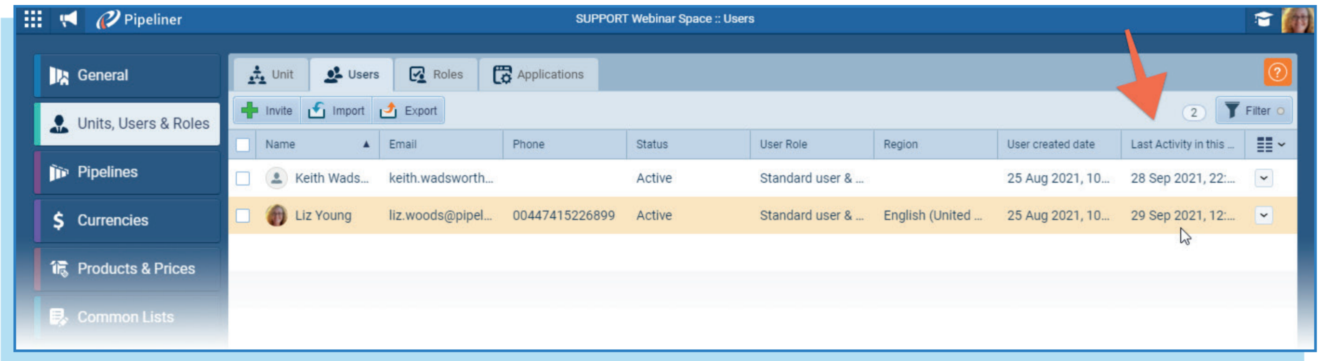
We have a clear structure at Pipeliner. We have a program called Pipelinerpreneurs, in which people have their own businesses selling and using Pipeliner CRM.

People in that program can only view certain data types within CRM—they don't need access to everything to do their jobs, and from a security point of view we need to restrict some areas. We also have Advanced Pipelinerpreneurs, however, and they have more access and can view more data.

The company's structure is critically important, and will be the basis of how your CRM is set up. Every company is different, so there needs to be an architect administrator who fully understands their company's structure and can implement it within CRM.

Users and Roles

Once this company structure has been fully established, it is then used to define what the CRM users can view in terms of data and what access they have. With Pipeliner, you can add as many regular users as needed. They can be imported and exported—a feature not many CRMs offer. When a user has been created, their activities can be monitored. You can see if and when the user has used the system and what they did.



Beyond just the ordinary users, the administrator architect must define user roles. Roles are critical, and are conceptually tied to the unit. A significant benefit of Pipeliner is that roles can be instantly changed within CRM, when needed.

Within Pipeliner, you can also create "super-users." This could become necessary in a larger company where, for example, you have more than one CRM administrator. These administrators would have specific functions such as consistently updating the company's product or service catalog. They wouldn't, however, be able to remove a user. There would be the "super-admin" who had overall authority and the final say.

Sales Units

Beyond just users, in Pipeliner there are also Sales Units, which represent your company's internal, hierarchical structure. Sales Units might be broken down by physical location, department, geographical sales areas, or any combination. The structure that you create can be used to limit user access to records according to the location or sales territory to which they are assigned.

Sales Unit functionality can be used for filtering record sets and generating reports specific to revenue or activity for a given Sales Unit. Every record within Pipeliner must be assigned to a single Sales Unit at the point of creation. Users, on the other hand, can be assigned to multiple Sales Units.

An assigned Sales Unit can be updated at any time, as might be the case if a sale moves through a process and gets handed off from one department to another, or a Pipeliner user's role changes at the organization.

Keeping It Simple

In thinking through the various units and roles, we see that the "architect" has been appropriately named. They are actually building a structure. If they're constructing a large building, such as the Burj Khalifa tower in Dubai, they must dig deeper to construct the foundation. Or if it's going to be a simple structure like a beach hut that sits on the sand it will be far less complex.

When creating the roles with CRM, the administrator must think through what this person is really going to need in terms of information. One serious flaw in traditional CRMs of the past was overloading the user with far too much data, way more than they needed. With Pipeliner, you can provide a role with only the information they really need, and no more.

Will the role need access to all features? Is this a power user? Do they need to import and export data? Do they need to be able to create automatic processes? (Note that only Pipeliner offers the capacity for a user to create an automatic process, to optimize workflows, **with the Automatizer feature**.)

If, for example, a person will only be responsible for contacts in accounts, they're not going to require dashboards, advanced reports or the Archive. Such information would only prove distracting. The more a person can remain focused, the more productive they are going to be.

Then, finally, what rights will a particular role need when it comes to the various entities within Pipeliner—accounts, contacts, leads, opportunities, pipelines, tasks and appointments? Should they see only their own records, or records of others? Should they have read-only access or reading and writing privileges? These same kinds of permissions would also be granted through the APIs, when needed.

Before anything else, the user roles and the various units must be very well defined from a business perspective. Once these are fully understood, then properly setting Pipeliner up becomes painless, and you can proceed to a **technical guide that will show you how users and roles are set up strictly from a technical aspect**.

CHAPTER 2

Multiple Pipelines

Within a CRM, a pipeline represents a sales or other type of process. Pipeliner CRM was the first CRM to enable multiple pipelines within CRM.

In this ebook, we've been discussing the functions of a different type of CRM administrator, called the architect administrator. This is the person who helps create processes and adapts them to pipelines. Note that, with Pipeliner, this function still requires minimal training and, in fact, can learn the technical aspects in a few hours. However, this person should have a deep understanding of their own company and the functions within it.

Several years back, we developed **multiple pipeline functionality** when we realized that many companies had more than one sales process. A company might have more than one sales department, or multiple product lines that required different sales processes. A complex consulting-related product or service would have a very different process from a transactional-related short process. A company might have a pre-sales process or an after-sales process in addition to its normal sales process.

Before creating processes, a company should go over what kind of processes they want to create. Do you need to develop processes for different product lines? Do you have a pre-sales process or an after-sales process? An onboarding process?

Pipeliner allows you to create as many processes as you need, including lead

processes (described in detail later in this chapter), as well as quote processes which allow you to manage sending quotes to your prospects and customers.

Sales Process Steps

In creating each process, I highly recommend keeping it simple. The clearer you make the process, the simpler it will be. We've actually seen companies that had like 24 different processes with 12 steps each. This is far too complex for salespeople or prospects and customers to follow, and you'll end up losing them.

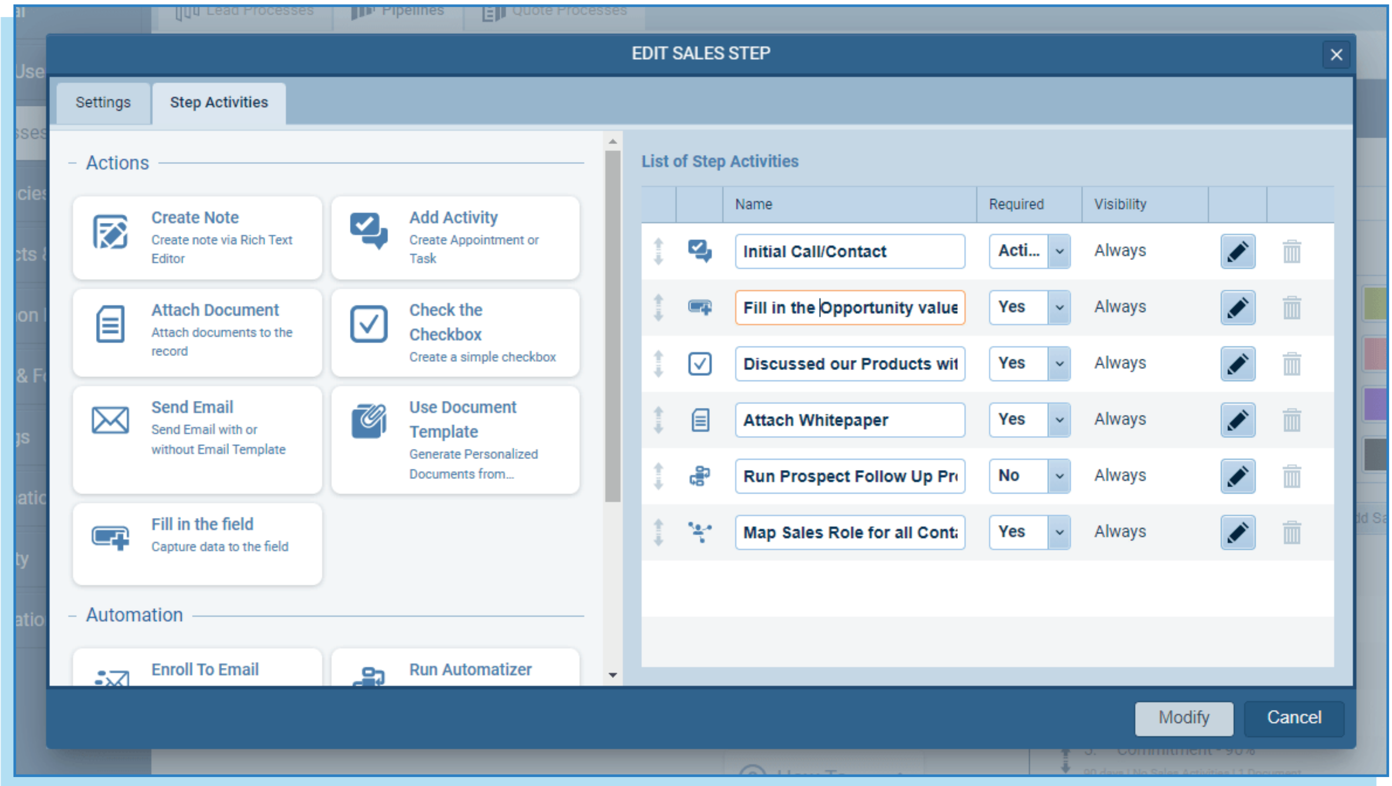
There are probably typical sales process step elements. Generally, you start with qualifying a lead. Then you have some kind of discovery in this phase—could this lead be a real opportunity? You then make a presentation to your prospect, followed by a proposal. Then there might be some kind of negotiation or due diligence on either or both sides, then the closing. A sales process can be more complex, but this is the general outline. We call each of these elements a sales step.

Sales process steps outline not only the main sales steps but also the tasks to be accomplished successfully at each step. These steps are used to increase win probability, influence customer deal size and speed pipeline velocity.

Activities

There are going to be specific activities within each process step. What kinds of actions should a salesperson take, for example, in the Discovery phase? In our case, the prospect defines the business needs. That occurs by the salesperson asking the process for business needs and obtaining them. There will then be follow-up steps, such as sending a thank-you note and possibly more information.

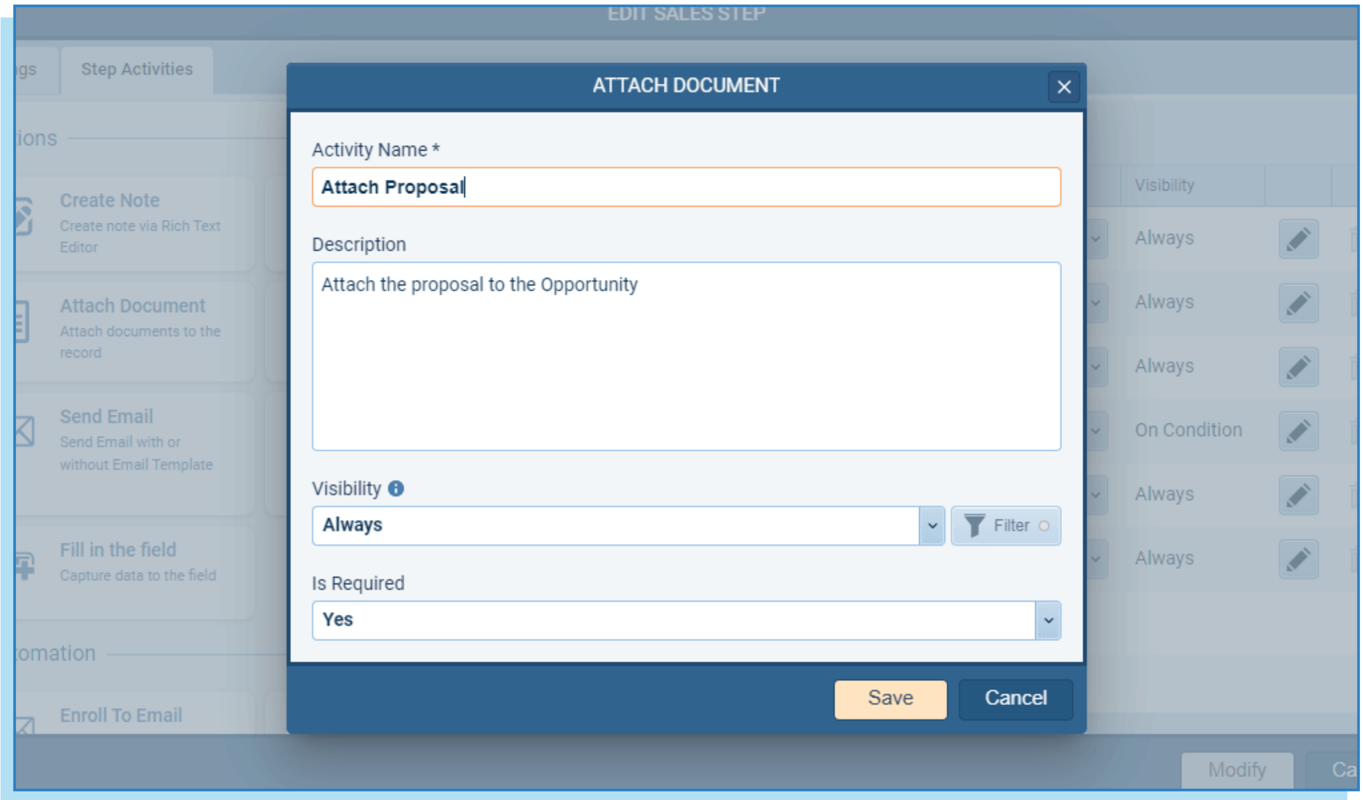
Generally, these kinds of actions are based on a particular sales methodology, and Pipeliner embraces any sales methodology a company uses.



Pipeliner's Sales Step Activities feature allows companies to embed a real sales playbook. Sales Step Activities allows an enterprise to lay out particular steps to take in order for a deal to move out of that stage and into the next one.

By adding a Sales Activities Checklist to each step of the Pipeline, you can assist your teams by providing step-by-step guidance using contextualized notifications which give specific suggestions on what actions your users need to take in order to follow your established process/strategy. It's like having your sales playbook open on the right page to guide their actions every time.

As you can see below, you can also attach documents in a particular step as they are needed. These documents can be from the G-suite, or Word or Excel. We even offer the capability for these documents to be automatically filled out. At the

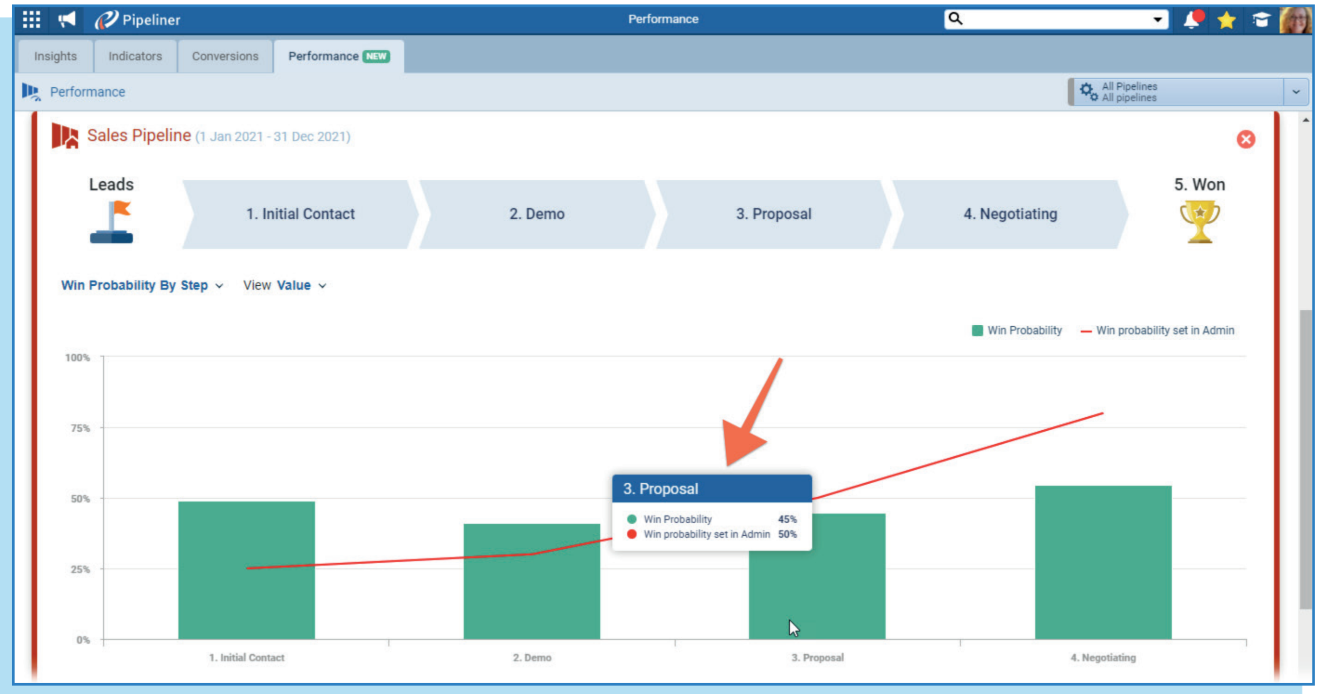


present time, Pipeliner CRM is the only CRM tool that can implement activities for each step—which we call "sales methodology out of the box." We have integrated this functionality seamlessly into our application, and are **open to every sales methodology**.

Win Probability

Once the stages of a particular pipeline are laid out, the architect administrator should calculate the win probability for each process step. This is yet another unique functionality for Pipeliner. Each phase has its own probability, which you can change as needed. Each progressive stage has a higher win probability—the closer you get to the end, the closer the probability comes to 100 percent.

Pipeliner Performance Insights visually shows you if the win probabilities you have set for each stage are correct. You can see the probabilities set in the back end



compared with the actual probabilities based on real-world performance. You can then adjust your expected win probabilities as needed.

Sales Velocity

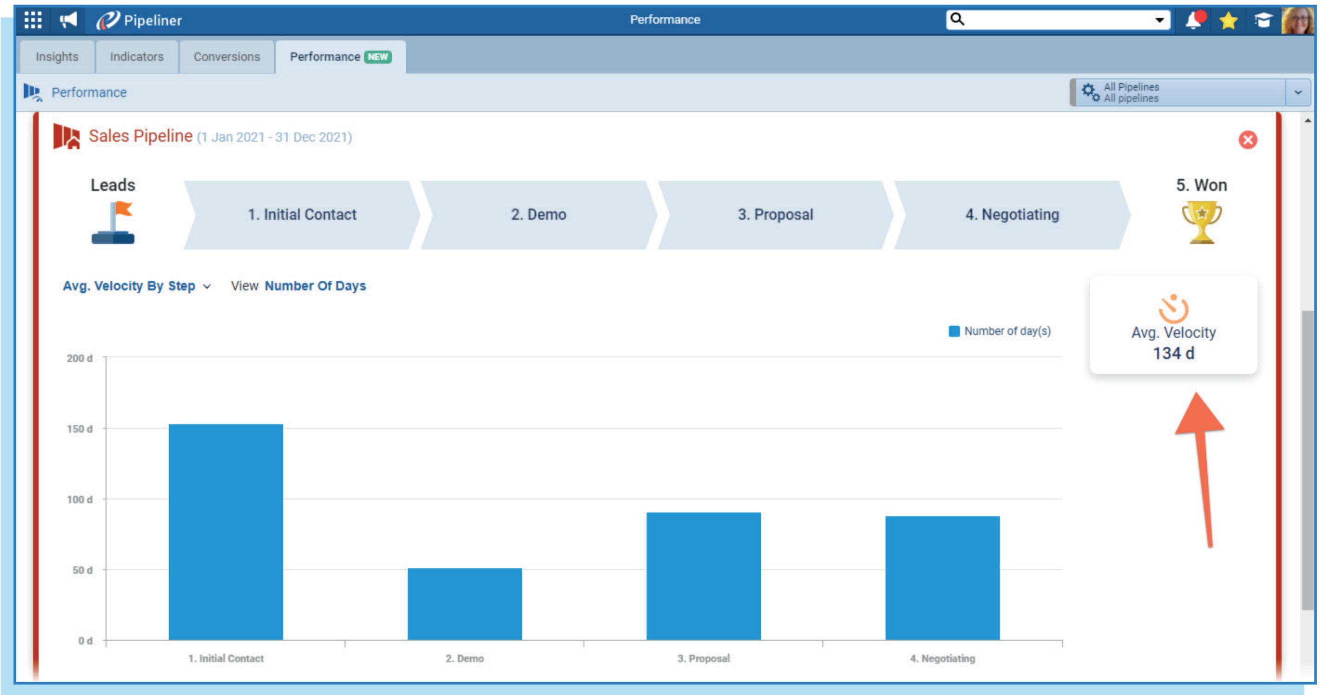
Along with win probabilities, the architect administrator should set up probable velocity—how long an opportunity or other process object normally remains in a particular step.

As with win probabilities, velocities can be visually set up within Pipeliner's

Performance Insights. You can then view the velocities you've set up as what should be, against the actual velocities in the real world. They, too, can be adjusted as needed.

As you can see, we have provided the sales manager the capacity to set up performance indicators in the system, monitor them and correct them.

Pipeliner is highly flexible, which means that nothing is set in stone. You can easily make changes and adjustments to any of the above parameters as needed, never slowing down sales to tweak the system. We liken ourselves to the incredibly efficient Porsche 3.5-liter engine, which has been constantly optimized over the years to make it better. Pipeliner—your sales process engine—is optimized in much the same way.

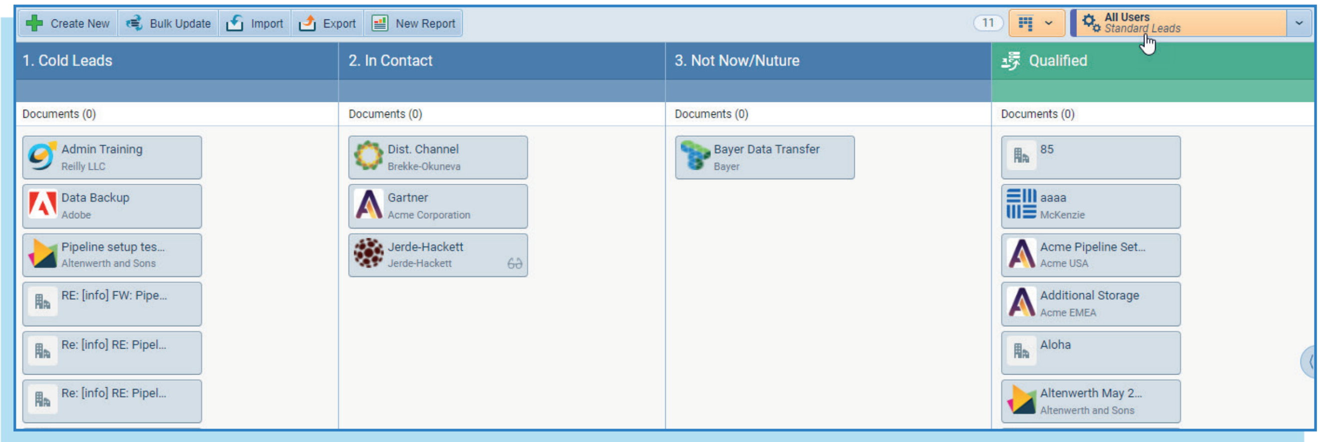


Multiple Lead Processes

In addition to multiple pipelines, Pipeliner also offers multiple lead processes.

While many CRM solutions have a single category for lead qualification, it usually isn't enough. This is because there is often a whole process behind qualifying a lead. There can be many different lead sources—for example inbound, outbound, partner referrals and customer referrals. If your company obtains leads from different sources, which many do, you most likely have different lead processes for managing each different type of lead.

For leads we have a board view, similar to our Pipeliner View for opportunities, so that your business development team members get the same powerful visualization that's available throughout Pipeliner.



Our lead management functionality enables an unlimited number of lead processes. Each of these has different steps and an associated activities checklist made up of text prompts, field prompts or activity prompts. Each of these prompts can be made "required" if needed, so that the lead must meet certain criteria before it is moved to the next step.

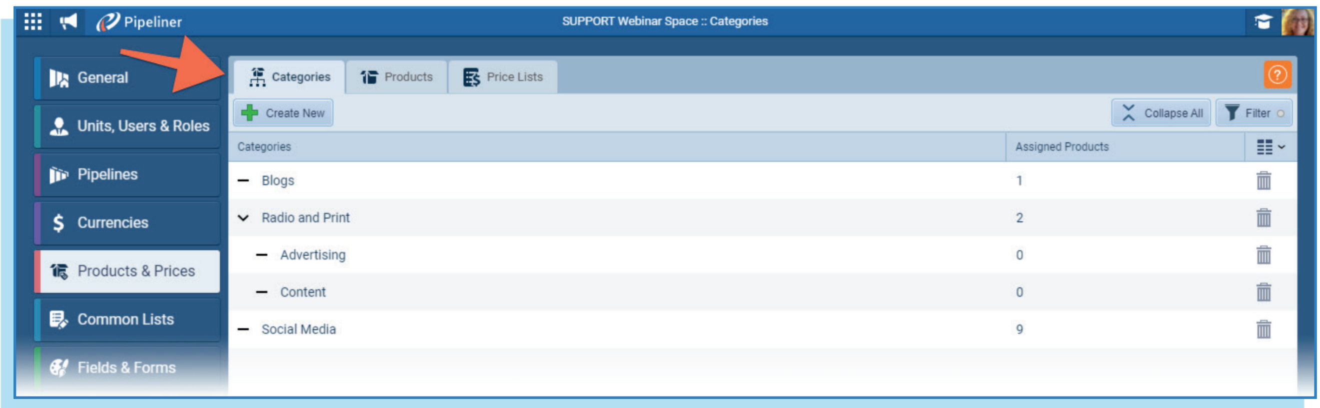
CHAPTER 3

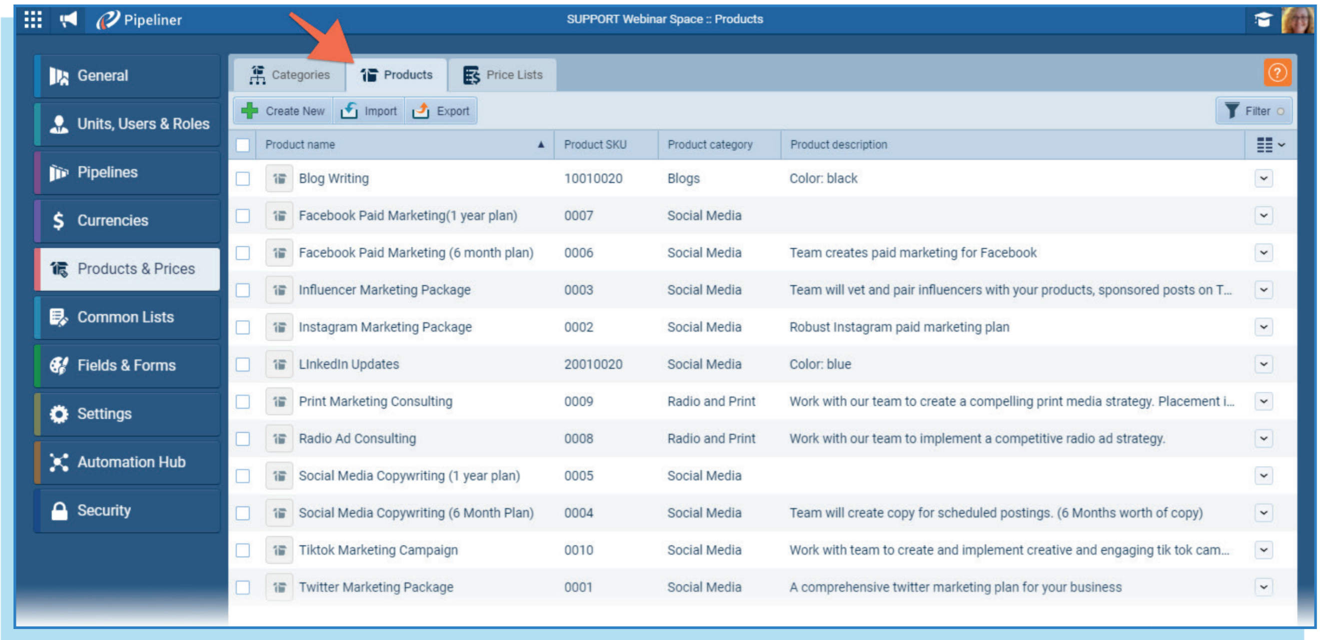
Product and Price Lists

Pipeliner is the only CRM offering that allows you to create an extremely flexible product list—one in which you can attach products to different pipelines and product lines.

Categories

To start with, you need to create product categories into which all of your products fall. **Pipeliner allows you to create these different categories**, making products easier to find.





Product Lists

Once you've created categories, **you can then organize the products you have in your system**.

Products can, of course, be assigned descriptions and SKU numbers. Plus, Pipeliner allows you to easily import and export products from your lists. This can also be done over APIs.

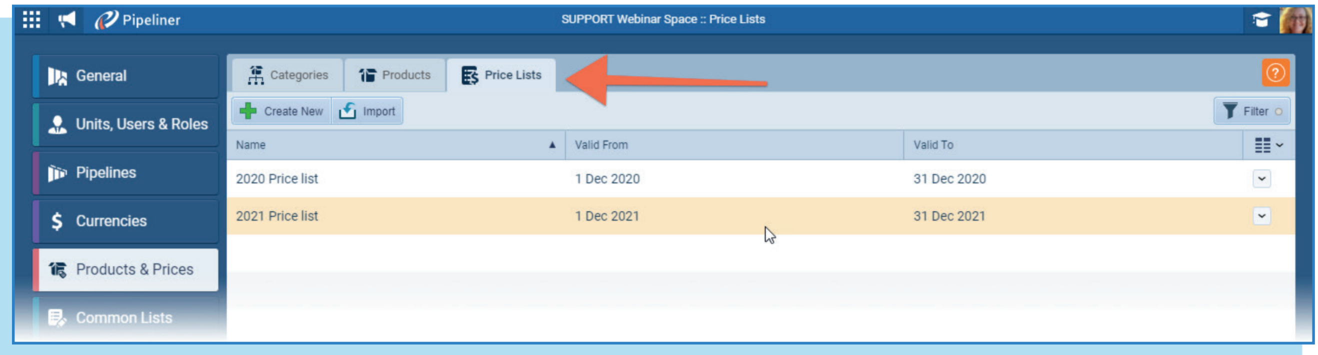
The most important point for you to consider is that products can then be correlated with the different pipeline processes to which they apply. A product may apply to all pipelines, or perhaps only to one specific pipeline. It can also happen (and often does) that different company divisions have separate product lines.

Back in the earlier days of CRM, there was only one pipeline available. This was because many companies corralled salespeople into a single sales process. For Pipeliner, this was conceptually the most significant barrier we had to overcome because a salesperson is not selling a process, but a product. Hence, (as we covered in the last chapter), we created multiple pipelines, to which products could be assigned where they actually applied.

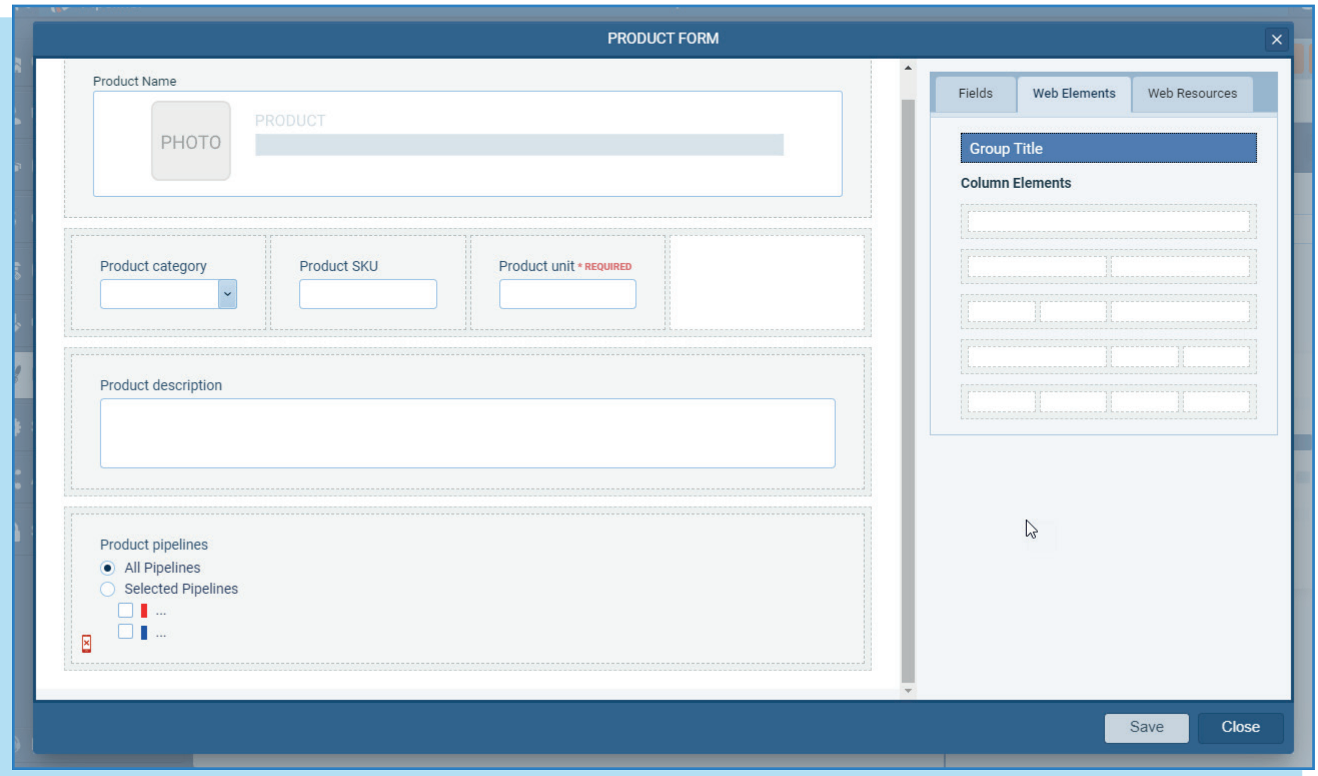
To provide a real-world example, do you think General Electric (GE) only has a single sales process for their entire product line? Clearly there is no chance that a jet engine would have the same sales process as a medical devices.

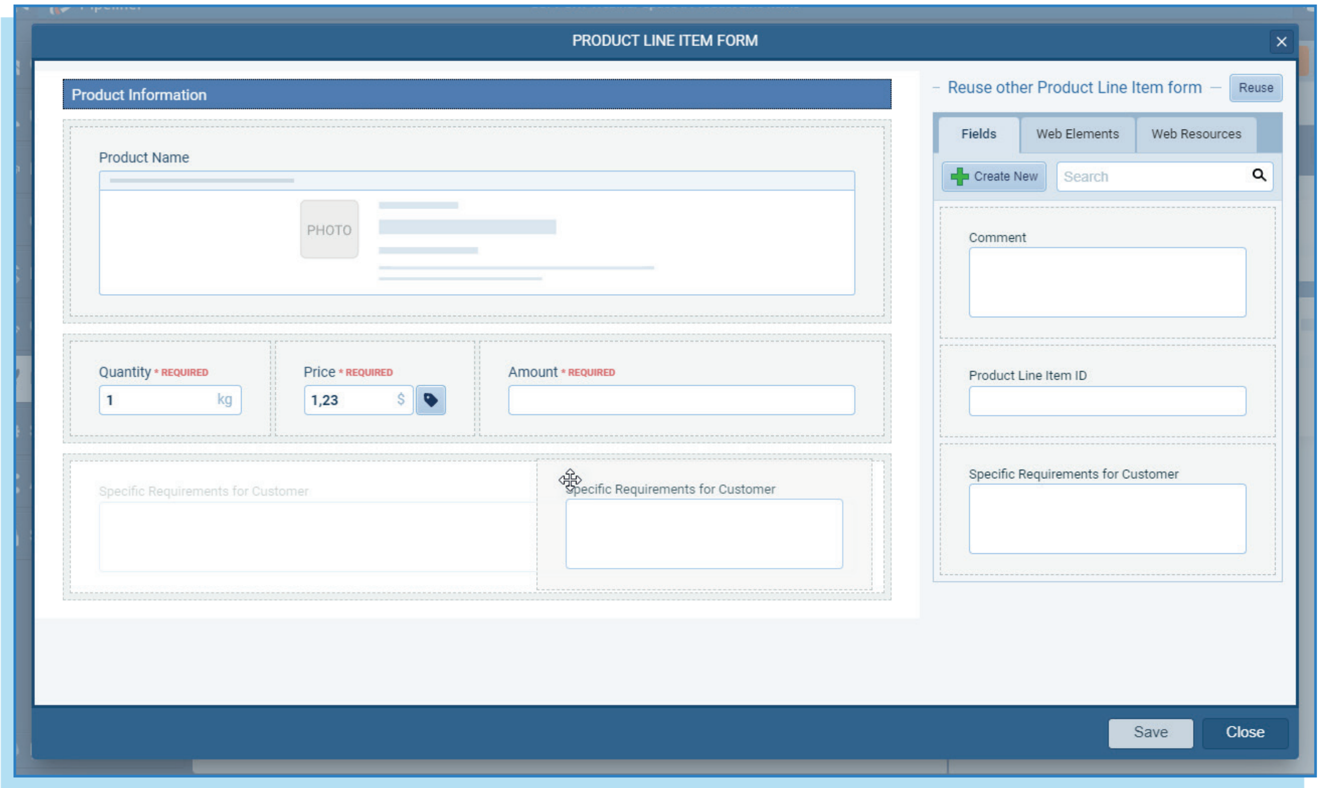
Price Lists

Once you have your products categorized and listed, **you can then create price lists**. A price list can be created and edited at any time.



For each product, you can customize forms and fields for flexibility.





You can also set up product line items so they can be instantly associated with particular opportunities.

To summarize, Pipeliner CRM allows flexible and rapid product:

- Categorization
- Organization
- Price lists
- Line items

Learn more about Pipeliner's products and services functionality.

Learn more about Pipeliner's Product Catalogue. «

CHAPTER 4

Common Lists

The Pipeliner CRM Common Lists are another first for Pipeliner CRM, and no other vendor has anything like them. They are directly correlated to putting the "R" back in CRM.

The Common Lists include elements relating to account hierarchy, sales roles, contact relations and account relations. As you'll readily see, these easy-to-utilize elements have incredible usefulness to sales and account management.

Accounts Hierarchy

Accounts hierarchy is a simple but powerful tool that visually displays the relationship between accounts, and links related accounts (companies) together.

As an example, a parent company could be linked, on an account hierarchy graph, to all of its subsidiaries. This is extremely useful to any salesperson dealing with these companies, to see where they stand in the hierarchy.

Another example is a parent company and its children and yet another is a main office and branch offices.

Because Pipeliner features are so flexible, Account Hierarchy is not limited in its use. Clients have used it to show relationships between a charity and its donor organizations, between property developers and favored contractors, and in many other ways.

Sales Roles

Sales roles are utilized by sales to show the various roles played by the people they are dealing with in their prospect and customer companies. Roles are used in **Pipeliner's Buying Center feature**, and allow people in the targeted company to be qualified or described in the sales process.

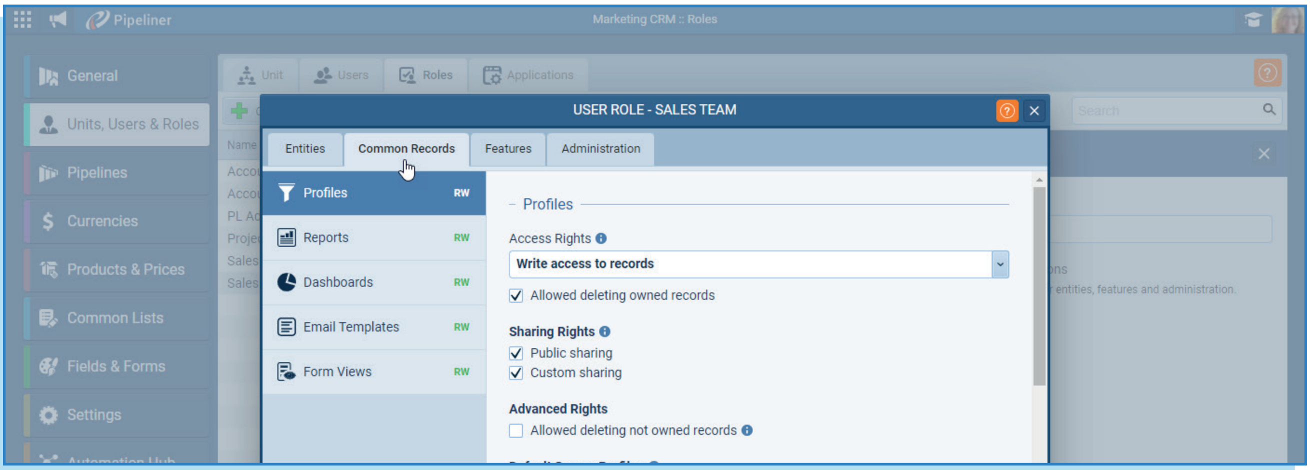
While the listed roles can be changed, added to or customized based on the industry, we have found seven roles typical in nearly all B2B deals. For example, you're going to have the ultimate decision-maker, who is defined in the Sales Role list as the "Signer." This designation can be given to them no matter their title within their own company. You can also assign a color to the role, so a salesperson can instantly identify them. Another critical role is the advocate—a person who, in the company, is your product or services's champion.

One person might be occupying several roles, too, and this can be shown.

The roles we have listed out are: signer, decision-maker, advocate, consultant, partner, IT, and the naysayer. Again, the list is flexible, and you can add to or change it.

Advanced User Permissions

For sales roles, Pipeliner also offers advanced user permissions.



Once a user logs into Pipeliner, they can, by default, create and share various reports, templates and created profiles. For some larger organizations, this can make it more difficult to support and manage their standard users. For this reason we have added the ability to control whether users are able to create, share and delete various types of common records.

Contacts Relations

In traditional contact management applications, you had a contact name, perhaps their title, and their phone number. But **Pipeliner's Contacts Relations** within the Common Lists makes it possible for you to know how you are related to people outside your company. As examples:

- Who do you know who is part of the same networking organization as one of your target contacts?
- Do you have a strong relationship with a contact who used to work with one of the decision-makers you're now trying to reach?
- Have you worked with a consultant who's working with your target?
- What former employees of yours are related to your contact?
- What common industry colleagues does this person have with you?

You can visualize this kind of data in a Relationship Graph, and even color-code it as needed.

Having this information could make a tremendous difference in the way you reach out to these contacts.

As I have said many times, the currency in the future networked community is recommendations. In such a community, a person cannot hide if they have committed criminal or even unfair acts on others—their reputation will be spread far and wide and follow them. There are more mobile phones than people on the planet today. Over 60 percent of the planetary population use mobile devices, and they can instantly know what's currently happening.

A great example of someone who "couldn't hide" is an attorney who, two years ago, was being lauded on all television channels as a political powerhouse. There was even consideration that this person could successfully campaign for president.

Today, Michael Avenatti is doing prison time, and his career is over forever because everyone on the planet knows who he is and what he's done.

Account Relations

The Account Relations feature allows you to assign a particular account-related role to a person within your targeted company. This is different than sales roles—it's a role within the account. It is different than the person's title within the company, and is utilized in the account's **Relationship Graph**.

For example, Account Relations is used to show if the person is the primary contact, the power user of your system, Admin IT, account contact, economic contact, or other that you may specify.

Making the Intangible Tangible

No other CRM provides functionality such as this, and it relates directly to one of Pipeliner's missions from the beginning: making the intangible tangible. This is done through Account Hierarchy, Sales Roles, Contact Relations and Account Relations.

In the sales arena today, we hardly see each other face-to-face anymore. We're not having physical meetings. We don't know, at this point, if this condition will ever change, but for now we know it will remain at least into the near future. Therefore we have made sales and account relationships very tangible. Your target person not only has a title and a face, but can be assigned a role. Their title may not be the role for you in the sales or account process, so this is important.

This is the kind of information that provides sales teams a powerful edge in selling to a target company. The more they know about a company and its contacts, the more they know about their relationships with their prospects and customers, the more they can precisely target their products and services.

Yes, the Common Lists are another primary factor in putting the "R" back in CRM!

CHAPTER 5

Fields and Forms

Another straightforward approach for Pipeliner administration is **fields and forms**. As with much of our other functionality, we've made fields and forms far easier than other CRMs. No programming is required, and this function, along with other administration, can be learned in a few hours by anyone who is computer-literate. Everything is done by drag and drop for creating a form.

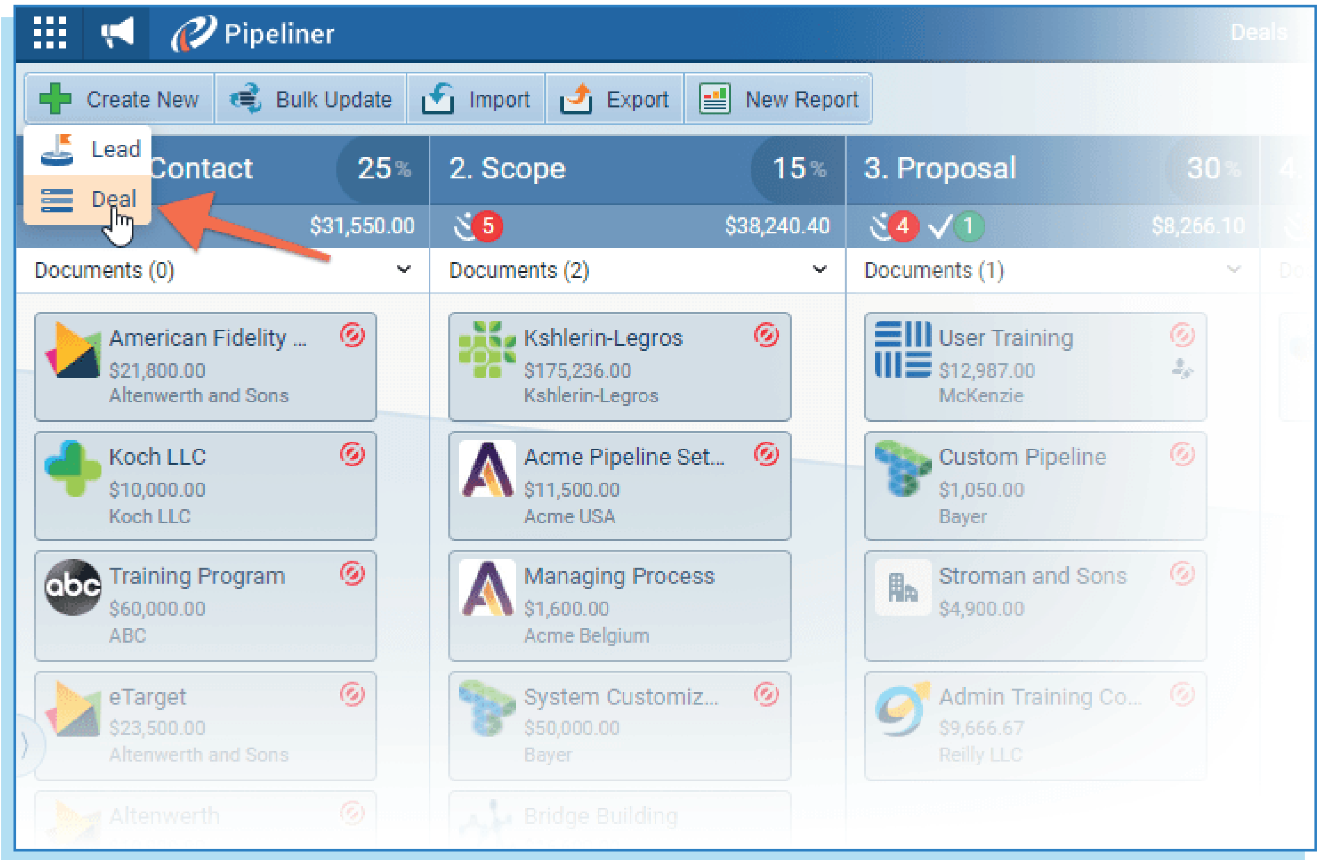
Fields and forms are utilized with Pipeliner CRM *entities*—which is how we refer to different CRM functions. Entities act as data storage for their own individual areas, and are 9 in number:

- Account
- Contact
- Lead
- Opportunity
- Task
- Appointment
- Product
- Product Line Items
- Projects (just released)
- Quotes

From what we've seen, this broad variety of entities satisfies the needs of 95 percent of companies.

Custom Entity Names

However, for some businesses, the use of specific terminology is extremely important for consistency across the organization as well as user adoption. For that reason, Pipeliner now enables entity name changes to reflect this business need. For example, “Opportunities” can now be changed to “Deals” if that’s the terminology you always use, as shown in the example below.



Forms

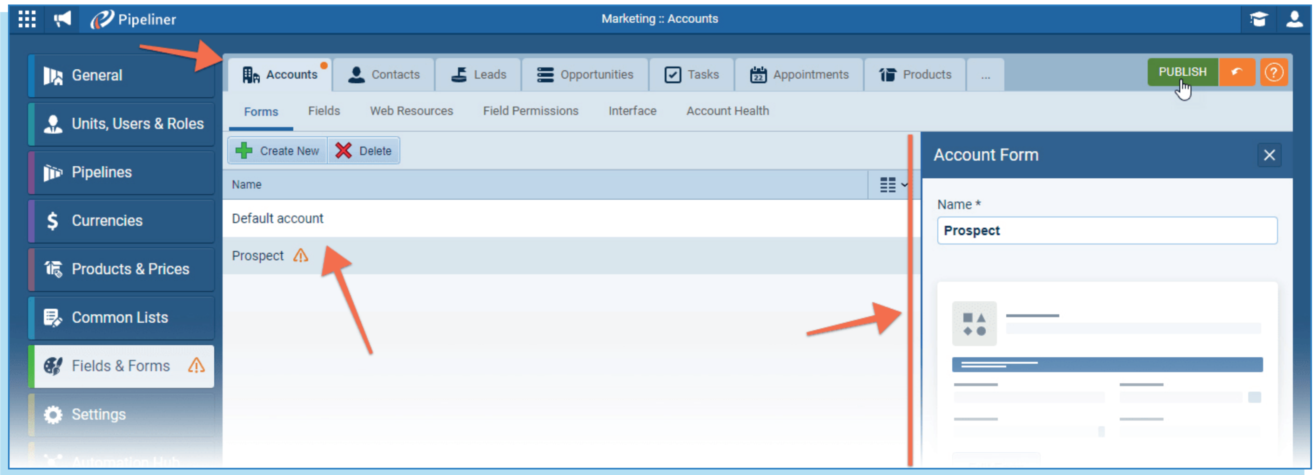
Most of the entities in Pipeliner have multiple customizable forms available, which means you have multiple visualizations of data points. When you are setting up your system, you must first decide which forms you’ll need for each entity and how you will use them. Within a task, a form might be a call, an email, a survey or a support ticket.

Different forms might be used for different departments. Or, in another example, you might have a partner program, and partners might be handled differently.

Creating Multiple Forms for Records

When you're working with accounts, contacts, opportunities (if you have multiple pipelines), leads, tasks, appointments and products, you can create multiple forms for different types of records.

For example, you might want to add different types of companies, such as "prospects," "customers," or "vendors." Or, you might want to add different types of contacts, such as "general contacts" or "subscribers." You can manage these different scenarios by creating different forms for each type of account or contact, as in the example below.



Fields

Within each form, you can create as many different customizable fields as you wish. These fields can be made accessible to varying degrees: not accessible at all, read-only, or with read-write permissions. We've done this because some roles will require access to specific fields and some will not, just as there will be various departments that will need access and others that will not.

While they might have been at one time, permissions aren't simply a matter of preference. Today data security is a prime concern, so only certain positions or departments in a company should have privileges. There are even legalities involved, such as with HIPAA requirements, that mean data access is a matter of law.

Software applications need field-level permissions to allow administrators to regulate data access. This function helps secure critical data. Field-level permissions allow managers to limit user role access to relevant data.

Field-level permissions can help restrict access to sensitive data. Imagine your company saves client names, addresses, and credit card details. Only authorized people need access to this sensitive information. You can restrict access to this information to those with field-level rights.

Settings

Not everyone calls fields by the names we have given them in Pipeliner. All companies are different. Therefore, with our settings feature, we empower you to customize field names as needed.

Settings also allows you to change “from” emails, so that a user can send emails from a company email address instead of their personal email. Company phones can also be included.

Project Management

Our new Project Management entity deserves special mention, as it is differentiated from other entities in several significant ways.

Project Management allows you to create different types of projects, utilizing different kinds of forms. As with other entities, forms can be edited and customized. Fields—such as rollup fields which can be configured to aggregate data about related records, and lookup fields, which are configured using filter criteria—can be customized and added to forms.

Once a project form is created on the back end, it is available as a template on the front end. The project would then have process-driven steps.

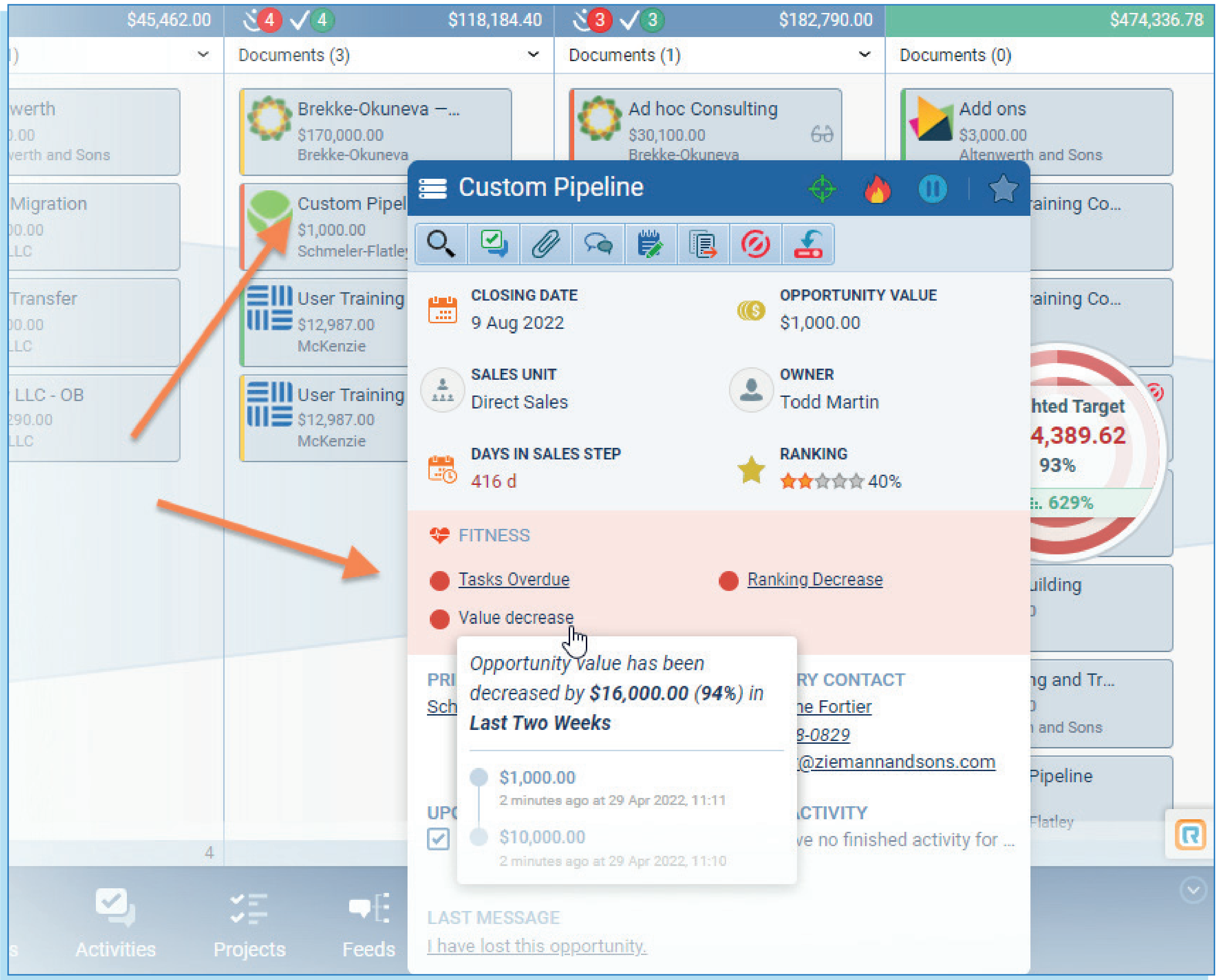
The project can be added to an account or opportunity, or it can even be used by itself as a standalone project. Within an opportunity, a project could be a particular customer’s buying process. It could also be an onboarding process, utilized with any new account.

The great news is that project management applications are generally not correlated with CRM. But in the case of Pipeliner, project management is built right in, and operates seamlessly as part of CRM.

Opportunity Fitness

Opportunity Fitness gives you an overall view of the health of your opportunities or leads. Fitness is configurable using both predefined and custom indicators.

This feature is designed to give users an at-a-glance overview of how each opportunity is tracking against criteria such as "Is it being proactively managed by the owner?", "Is the owner in regular touch with the main contact(s)", "Is there a planned next step?", "Is the opportunity being pushed out or devalued?"



Depending on the "answers" to these indicators, each opportunity's fitness is evaluated, and visually presented, as "Looking Good", "Notice", "Pay Attention" and “At Risk.”

Your organization can choose which predefined or custom Fitness Indicators to use, and how to configure the rules that apply to them.

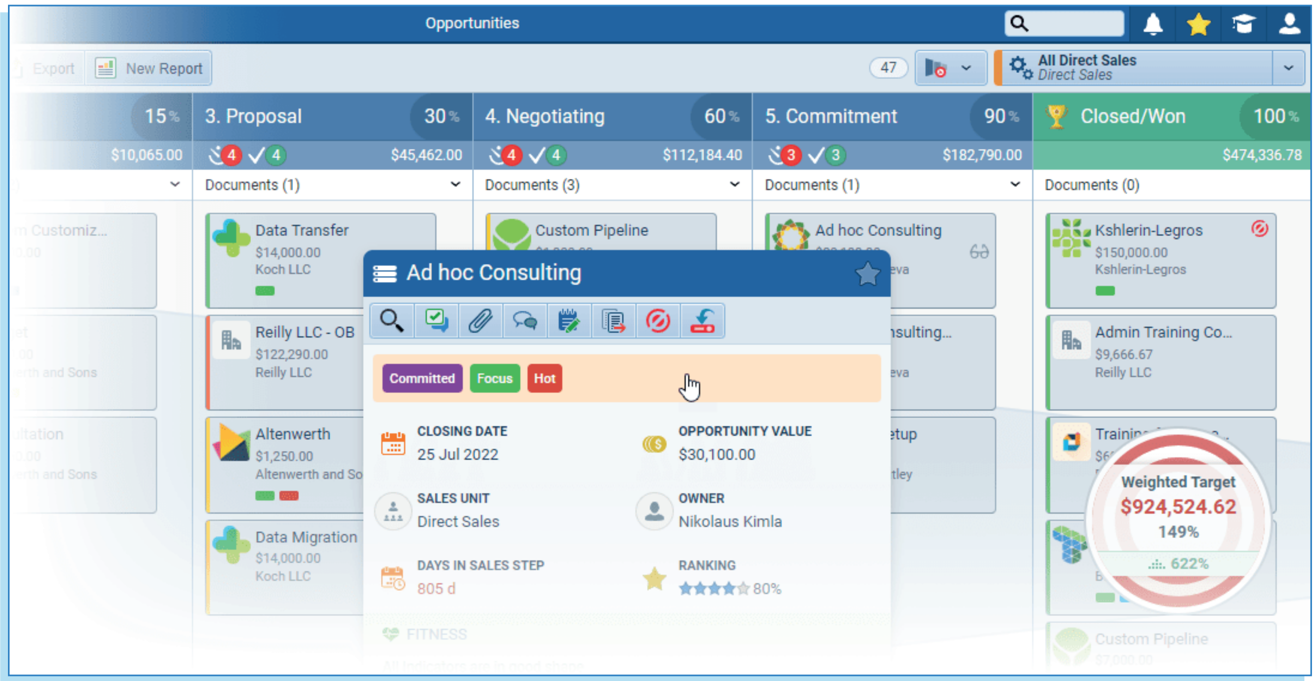
Account Health

The Account Health Feature is another major enhancement to Pipeliner’s Account Management capabilities. This feature provides an overall view of the health of your accounts, and can be viewed for individual accounts.

§You choose which Pipeliner fields to use for your business as “Health Indicators”, what to call your “Health Categories” and what scoring calculations to use.

User Tags

Tags are an incredibly useful way to flag, or categorize, accounts, contacts, leads or opportunities in Pipeliner. Users can select multiple tags per record as needed and—if their user role allows—can create new tags on the fly from inside the web app. When created, tags can be color-coded. Clicking on a Tag from one record dynamically drills down into a list view of all other records with the same tag, and the data can be actioned directly from the list.



Flexible

A significant aspect of Pipeliner's fields and forms is their flexibility. After you've set them up, you can be assured that, if required, you can easily change them. Nothing is set in stone.

Our Goal—Your Independence

The reason we have made it so easy to customize Pipeliner's fields and forms is to make it possible for you to independently run your system. When you need to set up new forms or fields, you can do so without the requirement of outside guidance such as a consultant—which you may or may not be able to find or afford.

In the design of our features, just as in the design of our CRM solutions, we utilize cybernetic principles—the science of simplicity. This simplicity applies to feature ease of use and also to their customization by an administrator. «

CHAPTER 6

Benefits of Artificial Intelligence to CRM

Any company in the market for a CRM solution today should beware of wild claims being made in the name of artificial intelligence being used in CRM. Clearly, there are functions AI can perform today, and functions that it clearly cannot.
The most prominent AI CRM product being sold at the moment is sold on the presumption that AI will affect how decisions are being made within organizations, and will actually change how selling is done. AI will provide greater insight into customers, leveraging big data to identify when they will purchase. AI will forecast purchasing trends and inform promotional activities, and even allow prediction of marketing events.

Predicting Human Behavior

These claims are actually being made on faulty logic—that human behavior can be neatly categorized and predicted. This is an assertion borrowed from mainstream economics, which says that human behavior can be mathematically predicted.

This “prediction” is done through an artificial construct called Homo Economicus.

According to current mainstream economic theory, Homo Economicus will react the same way every single time to various economic stimuli. If Homo Economicus is placed into various algorithms, the theory says, then we can use those algorithms to make predictions about human behavior.

The reason this doesn't work, according to the Austrian School of Economics—and, really, according to logic—is that human action, which is central to any economic system, is not predictable. Every human being takes different actions according to their own desires and thoughts.

It follows, then, that when it comes to sales, and the way that artificial intelligence is used in sales and CRM, that "prescriptive insight" which would seek to inform a salesperson on how they should behave and what actions they should take, would be risky at best.

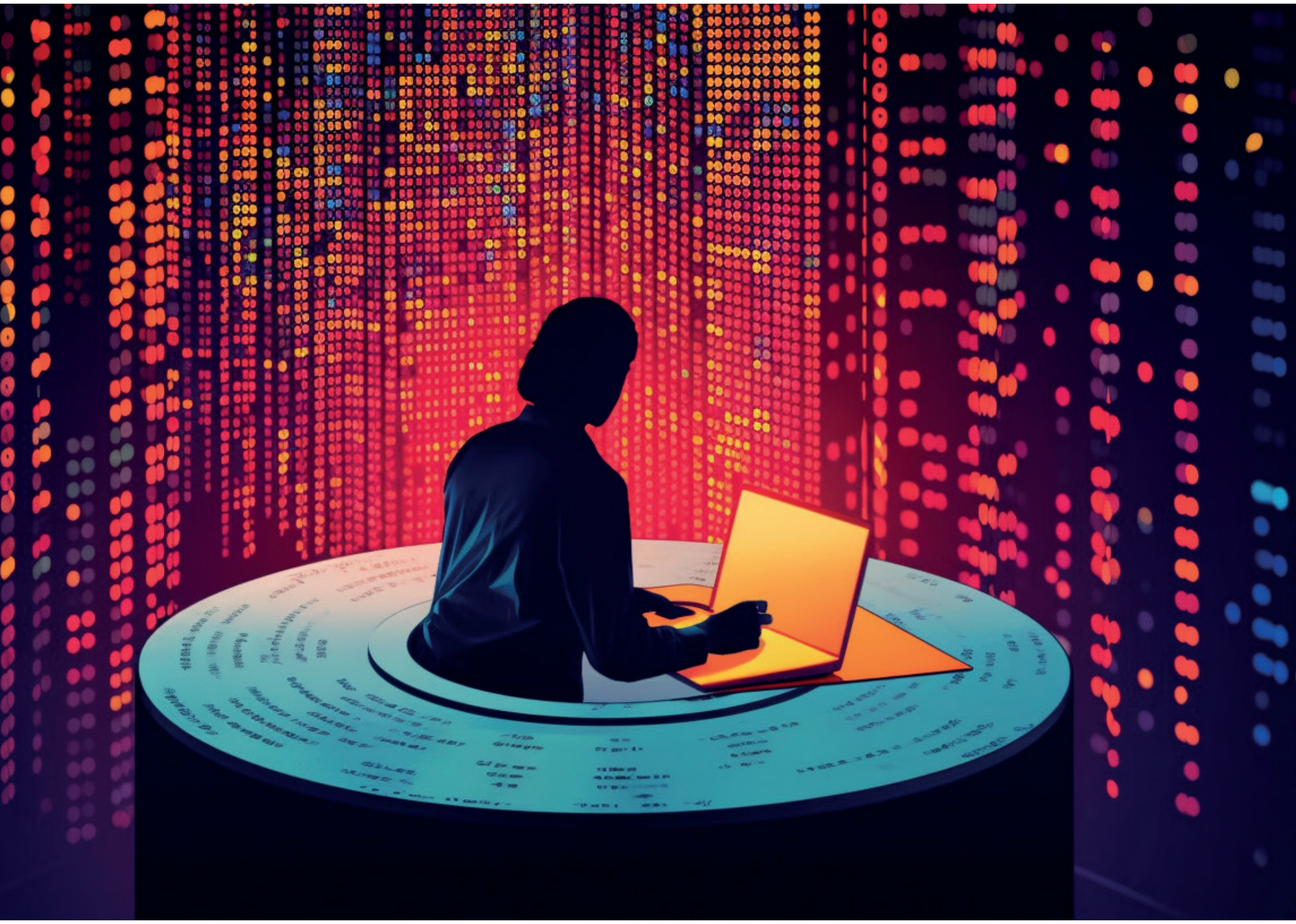
Predicting Complexity

Beyond human behavior, sales itself today has become a very complex activity. Just within our own industry, we have many different kinds of roles. We don't just have a "salesperson"–we have sales development reps, we have business development reps, we have inside sales reps, and outside sales reps. We have account managers. We have "farmers". We have customer success managers. All of these are types of salespeople.

Even all of these can be broken down because in each type we have beginners, more experienced reps, the veterans, the underperformers and over performers.

Right there you have 25 or more variables. And that's before we take into account different sales territories across international lines which of course introduces a whole other set of variables. A salesperson in Europe is definitely selling differently than a salesperson in the US.

So how could AI and its algorithms possibly take all of this into account? You guessed it: it's not very possible.



Supportive Artificial Intelligence

In our own field—sales—one prediction that's been bandied about in the last few years is one that says millions of sales jobs will be replaced by artificial intelligence. I make the exact opposite prediction—that instead salespeople will be incredibly assisted by artificial intelligence, and will be able to sell like never in history. AI will be supporting different roles in a company such as SDRs, sales reps, customer success manager, or even the sales manager.

For Pipeliner CRM, we only promise what we can deliver. Our AI engine, called Voyager, is utilized throughout the application in a totally supportive nature, providing precise direction and support to sales managers and salespeople.

Voyager—Pipeliner CRM AI

The AI employed in Pipeliner CRM greatly assists salespeople, as laid out above.

Just like its space probe namesake, Pipeliner Voyager continually navigates and explores the data contained in the universe of customer and prospects captured within Pipeliner CRM. Using intelligent algorithms Pipeliner Voyager guides and informs salespeople and sales managers by selecting and presenting key indicators that identify actions needed to be taken, areas that need attention as well as providing an early warning system on the health of opportunities in the pipeline. Pipeliner Voyager, just like Voyager the probe, never sleeps!

Pipeliner Voyager is a support and a guide providing insights and intelligence that are actionable by the salesperson or sales manager. It helps cut through the noise and makes what often seems like an expansive and daunting universe of sales opportunities manageable. And just like it is the analysts and scientists at NASA that determine what to do with the insights generated, it is the sales professionals that ultimately determine how best to leverage the artificial intelligence that Pipeliner Voyager is sharing.

CHAPTER 7

Best-of-Breed Connectivity

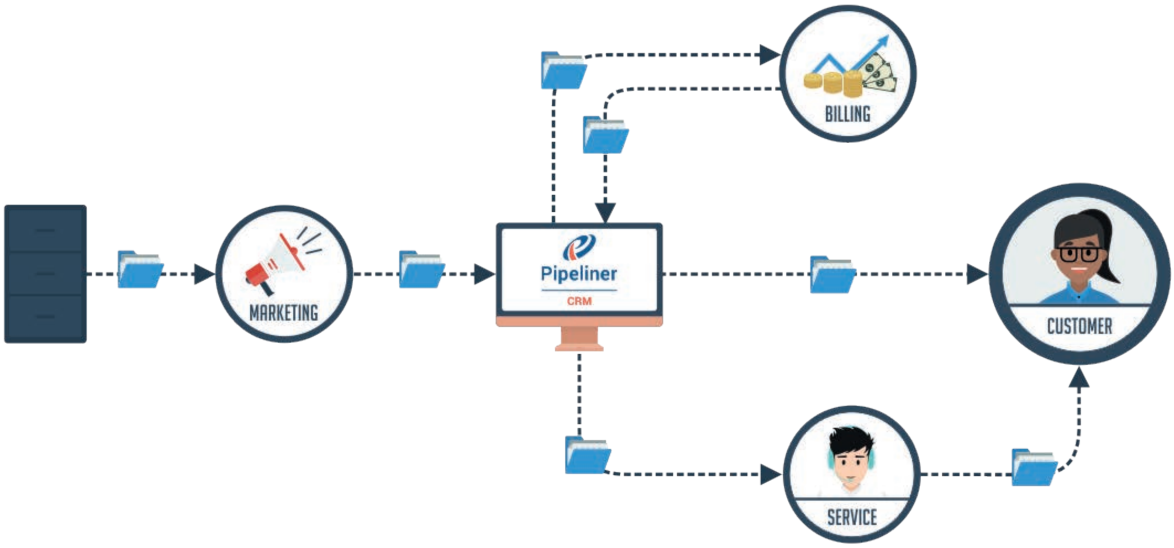
A primary philosophical tenet at Pipeliner is "best of breed." Along with Pipeliner, we want you to be able to integrate and connect with the very best applications out there for all your other tasks and duties. Pipeliner connects with all the systems you use, automates your sales force processes, and easily imports or migrates all your data.

To start with, Pipeliner connects with over 50 of a company's most "tried and true" applications. Many companies, however, have their own and legacy applications—and for these, Pipeliner connects using state-of-the-art APIs, RestAPI and GraphQL.

Pipeliner Automation Hub

Today data is the lifeblood of any organization and the efficiency with which the correct data flows between systems and people (both internal and external) can make all the difference in today's hyper-competitive and rapidly changing market.

As hard as many companies have worked at integrating systems and automating data flow, the reality is that it has been prohibitively expensive to do even on a medium, let alone, on a large scale. Systems integration has required expensive process analysts, programmers, integrators, and consultants – and those costs are



replicated everytime a change to an integration is needed.

So today most data flows in companies resembles something like a cross-country journey to deliver a package – you may start the journey on a highway but then reach a river with no bridge so you have to transfer to a boat but the boat only crosses twice a day so you wait – when it arrives you can take the package onboard but not your vehicle – so upon reaching the other side you need to transfer to a different mode of transport, perhaps a train but the train terminates some distance from your final destination and in fact adds miles onto your journey. In other words, you can get your package to the destination but the process is not efficient because all the different parts of the journey do not work in sync or are not connected in any meaningful way.

Now imagine a scenario where you could draw on a whiteboard the most direct and efficient way to get your package from point A to point B with all of the different transportation systems working seamlessly in collaboration and synchronized to eliminate wait times. And you had a technology that would quickly and easily deliver this into reality – what would this mean to your business?

Swap the package in our scenario for business-critical data and the transportation systems for all the different technologies you use in your business and this is exactly what you can do with the Pipeliner Automation Hub.

With the Pipeliner Automation Hub, you can finally integrate any Best of Breed system with Pipeliner CRM at the core. Now you can select the Marketing Automation system, Support Ticketing system, Quoting system or any other system of your choice and have them work seamlessly together.

CHAPTER 8

Summary and Final Thoughts

Overcoming Silos

As differentiated from the day-to-day CRM administrator, the architect administrator is the one who operates on a conceptual level of the organization's business processes, and continually finds ways to create those processes within Pipeliner. These functions are not only designed for sales—they could very well be for anywhere else in the company. The architect administrator, in my opinion, is the new norm for the future.

One fundamental function of the architect administrator is to overcome silos. Traditionally, departments within companies have operated in silos, with their own applications, processes and functions. These silos have been independent from one another, resulting in unexpected messes and results such as miscommunication, missed targets and more. It became evident that businesses needed an overall infrastructure.

Pipeliner places tools in the hands of architect administrators that allow them to build perfect processes for operational management, sales and marketing, and more, that cross and interconnect silos.

RevOps

Interestingly, a new term has risen in business culture: RevOps. Short for “revenue operations,” RevOps is defined as “a business function that aims to maximize an organization’s revenue potential. RevOps drives full-funnel accountability through the alignment of Marketing, Sales, and Service across your organization’s process, platform, and people.”

The need for such a function arose because each separate department was fully occupied with its own operations, didn’t have enough vision and coordination with other departments, and therefore departments were hindering each other. Companies have increasingly become aware of this problem and, for that reason, have been embracing this new approach.

RevOps = Pipeliner

Pipeliner CRM is, in actuality, a full RevOps function. We’ve always been more than just a sales tool—we’re a process engine for the whole company. Right now, processes are not only central to the operation of a company but also link all company automation and defined forms. Pipeliner has had a holistic approach from the very start, so the “RevOps” function is nothing new to us.

We have made it easy for a RevOps function to create intracompany processes that report issues, and it matters not to which management bodies these issues are reported.

In former times a function called sales operations was responsible for CRM customization and backend work. Because of the design of our CRM, we’ve made this function very simple, and raised it up in the company hierarchy into what could now be called a RevOps function. This is vital, because departments must work seamlessly with each other in today’s lightning speed of commerce.

An ideal RevOps solution contains powerful reporting capabilities and dashboards so that a company executive can immediately see where they should implement a strategy and make decisions about it. The solution must be overseen by someone—the architect administrator—who has a deep understanding of the possibilities of what can be done.

Although this new function has been created from the sophistication of today's systems, our system is simple enough that it does not require days or weeks of training to understand and administrate—it can be learned in hours. Architect administration does not even necessarily have to be performed by a company decision-maker.

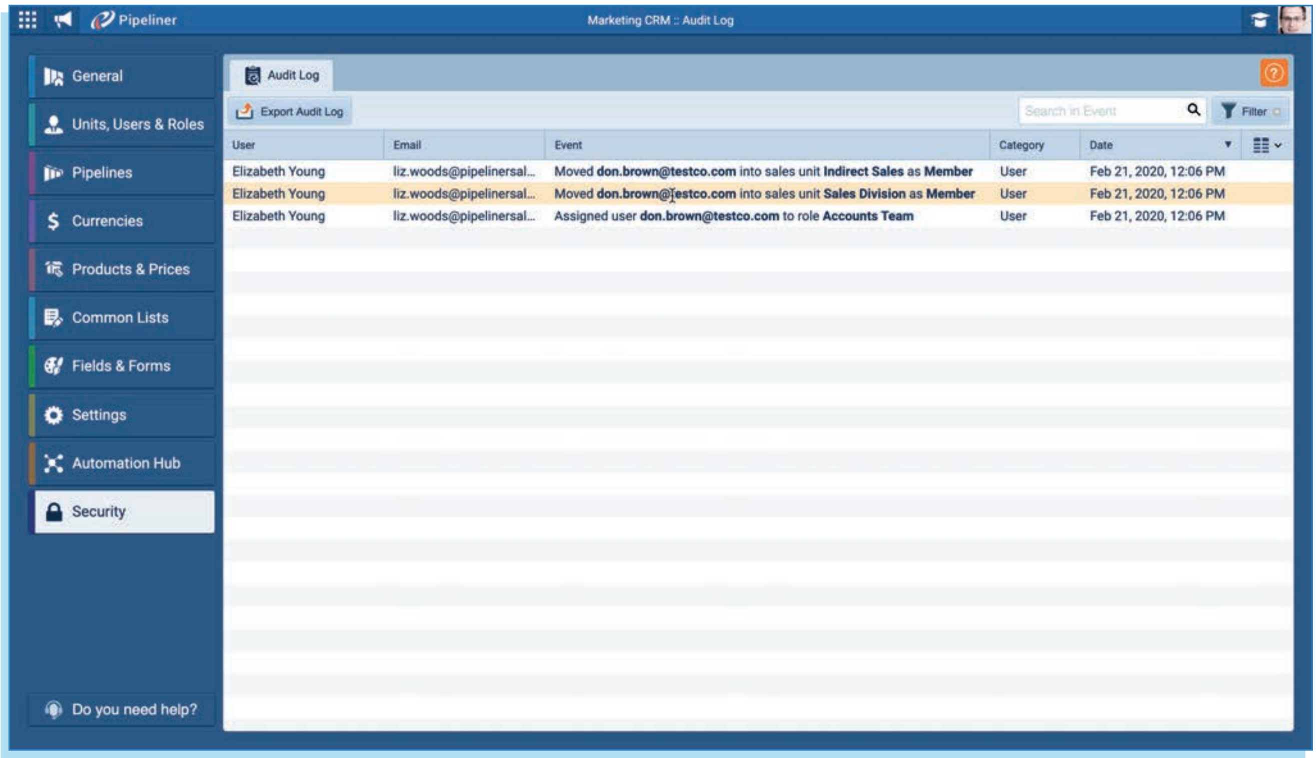
Exponential Growth of Automation

Another reason that such solutions are vital is that automation is growing with unbelievable speed—faster than most people think. This growth is affecting the workforce, which is radically changing. Many jobs are becoming obsolete. One day there will be no bus drivers, no taxis, no supermarket cashiers—all of that will be done automatically.

Increasingly more operations within companies are becoming automated, too. Just within our own company, we have hundreds of processes which have been automated, and there will be many more.

Security

Through Pipeliner CRM, it's not only possible to coordinate functions all across departments, but track everything that's been done through a powerful security log, called the audit log. You can view who is using the system, who has changed anything, and precisely what changes have been made. You can view changes not



only by user, but by entity (such as lead, opportunity or account) and other views. You'll be able to see any exports of data from any part of CRM.

Your company can customize the log for your own specific needs. «

ABOUT THE AUTHOR

NIKOLAUS KIMLA

A 30-year veteran of the computer industry, Nikolaus Kimla has founded and run several software companies. He and his company uptime iTechnology are the developers of World- Check, a risk intelligence platform eventually sold to Thomson Reuters for $530 million. He is the founder and CEO, developer and publisher of Pipeliner CRM, the first CRM application aimed squarely at actually empowering salespeople and sales management.

Also a prolific writer, Nikolaus has authored over 100 ebooks, articles and white papers addressing the subjects of sales management, leadership and sales itself.