

Pivotal CRM™ **Fit for your business.**

>> It's not about managing relationships with customers - customers manage relationships with you.

Execute reliably and immediately - across every customer touchpoint - and do it with meaningful insight into what customers want.



It starts with Sales & Marketing.

Pivotal: Flexible CRM

- o Complete suite of applications - Sales, Marketing, Service, Partner Relationship Management, and Interactive Selling.
- o Intelligent Internet Architecture - easy to customize, integrate, deploy and maintain.
- o Proven results methodology that increases revenue, margins and loyalty.

Pivotal Sales - a complete SFA solution that enables organizations to achieve the highest levels of productivity by facilitating the implementation and improvement of their own advantage-winning sales process. Pivotal Sales addresses four critical points-of-impact that dramatically influence the effectiveness of closing sales.

1. Implement Your Sales Process

Pivotal Sales allows sales teams to collaboratively sell across multiple territories, geographies and channels following their own sales process, which can dramatically shorten sales cycles, increase productivity and collaboration, drive user adoption and maximize every opportunity.

2. Provide Ubiquitous Access to Customer and Prospect Information

Pivotal delivers an integrated environment between Pivotal Sales and every salesperson's productivity tool of choice - Microsoft® Office - allowing sales teams to work in a single front office environment to organize information, schedule meetings, track progress and create/record email communications.

Sales forces that take advantage of Pivotal's mobile solution gain seamless access to complete CRM functionality, with or without a network connection, ensuring users always have the Pivotal Sales tools, applications and processes they require, including:

- o Miller Heiman methodologies, which have been providing sales organizations with winning sales strategies for more than 25 years; and
- o Pivotal Assisted Selling, which automates solution selling, giving sales reps the ability to quickly and easily assemble a business solution from a myriad of product and service options, configurations and prices.

3. Increase Productivity with Personalized Workspaces

The Pivotal SmartPortal contains a personalized view of a user's workday, including current opportunities, tasks and activities. It can be quickly and cost-effectively customized to integrate advanced content from both internal and external systems, including warehouse inventory records, financial systems data, in-context news feeds and more giving users a single point of access to everything they need – and nothing that they don't – increasing efficiency and productivity.

4. Break Down the Barriers between Sales & Marketing

Seamless integration between Pivotal Sales and Pivotal MarketFirst delivers high visibility and coordination between teams, breaking down traditional barriers between Sales and Marketing departments. With the ability to accept or reject pre-qualified leads in real time, track lead source and opportunity outcome, and trigger customer surveys at deal closure, organizations gain higher quality opportunities, increased sales execution capacity, and better opportunity distribution and management, resulting in reduced Sales and Marketing expenses.





"For us, our greatest benefit of the CRM solution, without a doubt, is going from 5 years of flat growth to growth of 25 per cent per year over the last two years since we implemented it. Growth is good – it allows us to build our business and to treat our customers and our employees very well."

**Chris Catliff, President
and CEO, North Shore
Credit Union**

Pivotal MarketFirst - gives organizations the technology, framework and applications required to build rich, long-term relationships with the right prospects and customers by addressing the four essential pillars of a robust marketing program.

1. Create the Lead

Effective marketing campaigns start and nurture prospect and customer relationships. They deliver the right leads to Sales, within budget, and help keep longer term prospects warm until they are ready to make a buying decision.

2. Capture, Qualify & Distribute Leads

With an integrated Sales and Marketing system, leads arrive in real-time, pre-scored according to the organization's value rating, with valuable prospect and customer information attached. Hot leads are passed directly to the appropriate sales rep. Warm and cold leads take their appropriate place in the queue. Important or high-value customers receive the attention they require, and leads that fall outside the specified criteria are discarded, ensuring no waste of valuable resources.

3. Track in Real-Time for Closed-Loop Marketing

Pivotal MarketFirst supports real-time reporting for all online marketing programs, including email delivery/failure rates and click-through response reports. Users can quickly determine the number of customers or prospects that registered for an event or responded to a survey, and drill down to view responses. At-a-glance insight into the entire lead lifecycle allows marketers to track leads through the sales process to determine whether they resulted in won or lost business.

4. Empower the Distributed Marketing Organization

Marketers and field sales personnel need tools to engage in customer and prospect conversations

in a timely manner and make the most of every interaction. Pivotal MarketFirst delivers the right marketing support for every user: conditional text support allows campaigns to address the requirements of every segment of the target audience; distribution of centrally managed templates to all users, regardless of location, reinforces the visual brand and ensures compliance with privacy legislation; and Unicode support means campaigns can be executed in all major languages worldwide.

And extends to every touchpoint.

Pivotal Service - automates the capture, management and resolution of customer service and support requests. Integrated with Pivotal Sales and Marketing, CSRs gain the tools and information they need to deliver fast, efficient and personalized service that results in improved customer satisfaction and long-term profitability.

Pivotal Partner Relationship Management

- simplifies the recruiting, managing and enablement of partners, while allowing companies to evaluate partner performance based on expertise and revenues. Pivotal Partner Management allows companies to recruit and retain better partners for less by extending collaborative sales, marketing and service capabilities, routing best leads to the most qualified partners and improving partner loyalty by rewarding performance.

Pivotal Interactive Selling - makes complex sales easier by providing a set of online guided selling tools that support sales reps working with complex products or services. Pivotal Interactive Selling helps reps work collaboratively with customers to configure highly personalized or complex solutions.



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Pivotal is the only complete CRM platform and application suite that can be tailored to fit the unique requirements of every enterprise. Drive measurable results that matter with CRM that works the way you do. Contact a Pivotal representative today to learn more about Pivotal CRM and how it can address your unique needs. Call 1-877-PIVOTAL (1-877-748-6825) or visit us at pivotal.com.