Empower & Accelerate the Sales Process

Possible Integrations

News Feeds
benefit partners
competitors
prospect company
industry wide
benefit offerings

Buyer Profiles
social profiles
past employment
education
demographics
location information

Proposal Database
templates
content selector
graphics selector
export document
team biographies

Social Media
linkedin
social listening
social messaging
google searches
competitor data

Accounts
- Prospects
- Clients
- Partners

Contacts
- Profile
- Related
- Stage

Leads
- Opened
- Working
- Converted

Opportunities
- Products
- Quotes
- Stage

lead assignment

implementation phase?

Pipeline Management
grow revenue pipeline
increase sales productivity
gain insights

IT Systems Integrations

- Chatter
  team instant messenging
- Call Coaching
  einstein call insights
- Dashboards & Reporting
  pivot tables
- Forecasting Revenue
- Lead Prioritization

New Task
Log a Call
New Event
Send Emails

einstein activity capture
email system integration

Bulk emailing
Appointment Scheduler
Virtual Meetings
Call Recording
Transcript A.I.

Needs Analysis
Proposal/Quote
Negotiation
Close

File uploads
Opportunity Aging

Voice to CRM
3rd party add-in?
salesforce anywhere app?

---

high velocity sales
enhanced email
einstein activity capture
linkedin sales navigator

legacy data migration
outdated data imported
user training (trailhead)

is it possible to preload every broker?
import all possible clients, then assign?

which add-ons, if any?
add-ons can be very expensive

CRM

record keeper

Sales Cloud
mobile access

Service Cloud
case details
work queues
- Customer Service
- Knowledge Articles
- Issue Resolution

Marketing Cloud
website builder
multi-channel
- Social Media
- Campaigns
- Advertising

Platform Cloud
data model
user interfaces
business logic
- Data Integration (APIs)
- 3rd Party Ad-ins
- Custom coding language
  schema builder
  object and components
  app manager
  process manager

Community Cloud
share data with partners
collaborate with outsiders

Commerce Cloud
b2c direct sales (gig economy)
master agreements
- Shopping Experience
- Multi-endpoint support

IoT Cloud

Instances
service stacks
scale
fail over
geography speed
data dictionary

Tenets
commingled with
other clients

Infrastructure
relational database
application servers

Properties
architecture

Services
software containers
storage
logic
search
notification
authentication

Einstein A.I.
predictive modeling
opportunity scoring
automatic insights
search

requires very robust
and complete data