

# Pivotal Sales<sup>™</sup>

*Sustainable Competitive Differentiation*

**Pivotal Sales is 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.**

## Implement Your Sales Process

Pivotal Sales is sales force automation for global sales forces, allowing sales teams to collaboratively sell across multiple territories, geographies and channels following their own sales process. With system-level support for their own processes, sales organizations can dramatically shorten sales cycles, increase productivity and collaboration, drive user adoption, and maximize every opportunity.

Pivotal Sales offers the most cost-effective way to automate an organization's sales process and update it over time as the business evolves, so sales teams can focus on improving productivity, meeting quotas and increasing revenue.

### **Pivotal Sales<sup>™</sup> Suite**

▶ **Pivotal Sales<sup>™</sup>**

[Pivotal Sales – Miller Heiman Edition<sup>™</sup>](#)

[Pivotal Assisted Selling<sup>™</sup>](#)

[Pivotal Contact Center<sup>™</sup>](#)

[Pivotal Mobile Sales<sup>™</sup>](#)

[Pivotal Sales Analytics<sup>™</sup>](#)

The enhanced Pivotal Sales suite interacts with and complements the Pivotal Applications Suite, which also includes Pivotal Marketing, Pivotal Service, Pivotal Interactive Selling and Pivotal Partner Management Suite.

An organization's sales process is one of its competitive differentiators, influencing whether deals are won, market share taken, and competitive advantage realized. But most SFA products frustrate sales teams by forcing the adoption of a generic sales process, inevitably resulting in poor usage and declining levels of productivity.

Pivotal Sales facilitates the quick, cost-effective deployment of an organization's unique sales process – no matter how complex. There's no need to change habits; no unnecessary downtime; and no steep learning curves, so salespeople can focus on what they do best: selling. As the sales process is refined and new opportunities targeted, Pivotal Sales evolves with the business, ensuring organizations can sustain their competitive advantage.

## Ubiquitous Access to Customer and Prospect Information

Sales forces are hampered by the need to enter customer interaction data into multiple systems over the lifetime of an opportunity or account, which directly translates into reduced productivity, low user adoption, and higher cost of sales.

Pivotal delivers an integrated environment between Pivotal Sales and every salesperson's productivity tool of choice – Microsoft<sup>®</sup> Office – allowing sales teams to work in a single front office environment, organizing information, scheduling meetings, tracking progress and creating/recording emailed communications. From initial contact to final proposal, sales representatives will never need more than one solution.

Pivotal Sales is also available as a mobile solution that supports sales users' needs to work in the office and on the road. Complete offline functionality is delivered in combination with the ability to reliably synchronize not only data, but application updates and platform upgrades, resulting in up-to-date business rules across the distributed enterprise.

# Pivotal Sales in Action

*A complete SFA solution, wherever and whenever required*

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:

- Miller Heiman methodologies, which have been providing sales organization with winning sales strategies for more than 25 years;
- 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; and
- Seamless integration with Pivotal Marketing, which delivers qualified leads in real time to sales reps. Click-through reporting gives Sales and Marketing a real-time view into the results of any marketing campaign.



Pivotal SmartPortal

## Personalized Workspaces

The Pivotal SmartPortal contains a personalized view of a user’s workday, including such information as current opportunities, tasks and activities that give users at-a-glance access to everything they need – and nothing that they don’t – increasing efficiency and productivity. The SmartPortal 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, etc., transforming the Pivotal SmartPortal into a true corporate portal – a single point of access to all relevant data for each user, driving user adoption.

## Breaking 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.

## Pivotal Sales – At a Glance

Increase User Adoption	
<b>MS Outlook Integration</b>	<ul style="list-style-type: none"> <li>• Bi-directional synchronization of email, contact, task and calendar information between Pivotal and Microsoft Outlook,<sup>®</sup> even when offline, creates a single repository of all customer interactions.</li> </ul>
<b>MS Office Data Interaction</b>	<ul style="list-style-type: none"> <li>• Reference Pivotal customer and prospect data associated with keywords directly within the MS Office application, increasing user efficiency even when offline.</li> </ul>
<b>Personalized SmartPortal</b>	<ul style="list-style-type: none"> <li>• Out-of-the-box portlets include current opportunities, tasks and activities. Customizable portlets include any internal or external data feed – everything from supplier status to a weekly list of service incidents to stock tickers – putting critical information at users’ fingertips.</li> </ul>
<b>Sales Methodologies</b>	<ul style="list-style-type: none"> <li>• Quickly and cost-effectively implement your unique sales process, ensuring user adoption.</li> <li>• Take advantage of the only official CRM vendor of Miller Heiman’s world-renowned Strategic Selling<sup>®</sup>, Conceptual Selling<sup>®</sup> and Large Account Management Process<sup>®</sup> sales methodologies.</li> <li>• Employ Pivotal Assisted Selling to decrease the cost of selling complex solutions.</li> </ul>

Mobile CRM	
<b>Complete Mobile Solution</b>	<ul style="list-style-type: none"> <li>Offline client provides 100% of the CRM functionality available to head office workers.</li> <li>Robust, high-performance synchronization of data, application, customization and platform updates (including Service Packs and Hot Fixes) allow mobile systems to be upgraded in the field.</li> <li>Centralized administration simplifies the maintenance, monitoring and troubleshooting of mobile and satellite systems.</li> </ul>
Functional Completeness	
<b>Activity Management</b>	<ul style="list-style-type: none"> <li>Apply action plans to opportunities, automating creation and assignment of activities to sales reps, then report on activities by each salesperson.</li> <li>Let sales reps organize and manage activities within their own schedule, increasing efficiency.</li> </ul>
<b>Opportunity Management</b>	<ul style="list-style-type: none"> <li>Track an unlimited number of opportunities per company, linking in external consultants and influencers.</li> <li>Determine each opportunity's estimated rating, potential revenue, close date and close probability.</li> </ul>
<b>Accurate Pipeline View</b>	<ul style="list-style-type: none"> <li>Real-time pipeline view gives quick snapshots of each stage, which can be rolled up for an overall view.</li> </ul>
<b>Revenue Forecasting</b>	<ul style="list-style-type: none"> <li>Produce sales forecasts by territory, sales rep, product or company enhancing revenue predictability.</li> <li>Create 'what-if' scenarios based on probabilities of closing sales in the pipeline to increase profitability.</li> </ul>
<b>Lead Management</b>	<ul style="list-style-type: none"> <li>Import, accept or reject, and track leads from Pivotal MarketFirst, databases, lists, etc, then track each lead to closure, ensuring accountability between Sales and Marketing.</li> <li>Qualify leads based on level of interest and solution details, then distribute leads (based on sales staff territory or product specialty) to sales staff, resellers or distributors, ensuring follow-up.</li> </ul>
<b>Territory Management</b>	<ul style="list-style-type: none"> <li>Define and redefine sales regions and territories without the need for programmers.</li> <li>Optimize sales coverage by overriding the automatic assignment of territories or sales team definitions.</li> </ul>
<b>Quote &amp; Proposal Management</b>	<ul style="list-style-type: none"> <li>Generate, manage and automatically expire multiple quotes per opportunity, increasing efficiency.</li> <li>Take advantage of a wide range of discounting options, including fixed amount or percent discounting at both the line item and quotation levels, facilitating negotiation.</li> <li>Automatically convert the accepted quote into a proposal, inclusive of personalized terms and conditions for repeat customers, streamlining deal closure and increasing customer satisfaction.</li> </ul>
<b>Contact Management</b>	<ul style="list-style-type: none"> <li>Manage contacts by company, opportunity, partner, etc, allowing users to work the way they prefer.</li> <li>Designate which contacts should be used for which activities, increasing customer satisfaction.</li> </ul>

## CRM That Fits Your Business

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.



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For more information, please visit [www.pivotal.com](http://www.pivotal.com).