

Pipeliner CRM Integration Connector

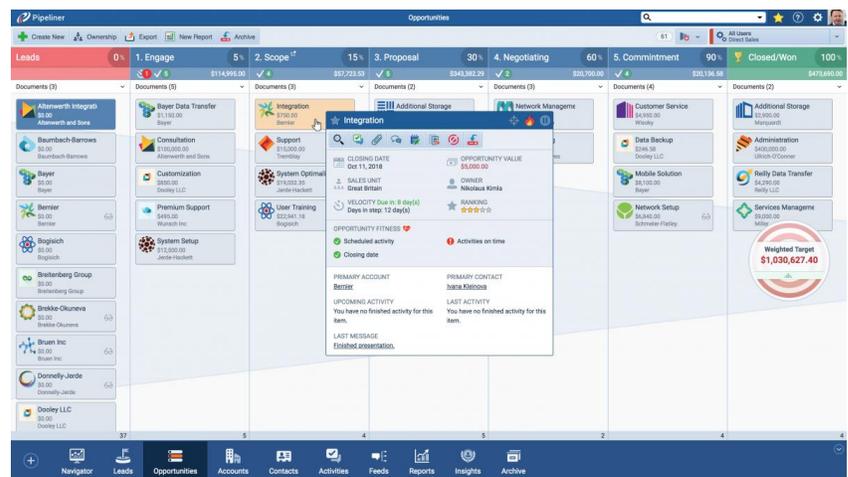
Pipeliner understands that the manufacturing industry is different and is reinventing CRM and leading the market with new ideas efficiently executed to meet the challenges of this digital age.

At the front end is a sales organization just like any other company—but behind it must operate an entire other organization consisting of tight, precision manufacturing, raw materials, supply chain and inventory management.

Pipeliner supports every function in manufacturing.

With its totally visual approach, Pipeliner intuitively empowers all users to take part in opportunities, customer support, or one of any of the processes for which your company relies on CRM.

ProfitKey recognizes Pipeliner's manufacturing focus, and for this reason we have built integration between PK Manufacturing and the Pipeliner CRM solution.



INTEGRATION WITH PK MANUFACTURING

ProfitKey takes Opportunity information from Pipeliner CRM and creates Job (or Job Lots) within PK Manufacturing with all the necessary lines.

Thus, with the new Pipeliner CRM Integration Connector a salesperson connected to Pipeliner CRM can create an order and send it into PK Manufacturing.

CRM MODULES

- Cross Organizational Collaboration

A manufacturer has many individuals and entities that must be fully supported by CRM. These include sales, marketing, customer service and support and operations, among many others. The CRM solution must be simple enough that it can be readily grasped and understood by all concerned—yet powerful and accurate enough that the data it provides is as reliable as possible.

- Forecast and Analysis

Central to a CRM solution for manufacturing is highly accurate forecasting and analysis. Without such functionality, any company would be flying blind—but a manufacturing company specifically would be committing untold resources with total risk.

- Customizable Multiple Processes

A single-pipeline CRM is not going to work for a manufacturing operation, simply due to the sheer volume of processes utilized. There is the manufacturing operation which has its own set of processes, then the marketing and sales aspect of the company. It is far more efficient for all of these processes to be collectively addressed within the CRM solution.

- Control for Sales Management

Pipeliner precisely mirrors your company's sales process so managing opportunities has never been easier. Leads are dragged and dropped from one stage to the next. Opportunities are visually displayed so their value, ranking, time-to-close and other important factors can be immediately seen.

- Focusing and Prioritizing

A salesperson should be able to focus in on particular types of opportunities, and examine their pipelines from different aspects such as products lines, ranking, or size of deal. With Pipeliner, every

salesperson's CRM screen looks different because it highlights their personal opportunities and priorities.

- Activity and Task Management

Within each stage of a sales process, there are various tasks and activities that must be performed in order for an opportunity to be moved through that stage and into the next one. Pipeliner makes these an integral part of CRM, driving efficiency forward to an even greater degree.

- Sales Performance Metrics

In or out of manufacturing, a primary purpose of a CRM application has been to compare the performance of one sales rep to another, or the performance of territories or sales units. Such functionality is crucial for a number of reasons. Pipeliner has greatly simplified and made far more powerful this aspect of sales management.

- Following the Buying Process

One problem that is peculiar to manufacturing is the number of people on both sides of the buying-selling proposition. With Pipeliner it easy to keep track of all of the different decision makers for an account and opportunity, and how they relate to each other.

- Document Management

With manufacturing, certain customer-specific specs as well as other important documents are required on a regular basis such as contracts, terms, and conditions, marketing collateral, competitor comparison sheets, or industry benchmarks. Pipeliner makes these documents accessible right in CRM so that any time they are just 1 to 2 clicks away.