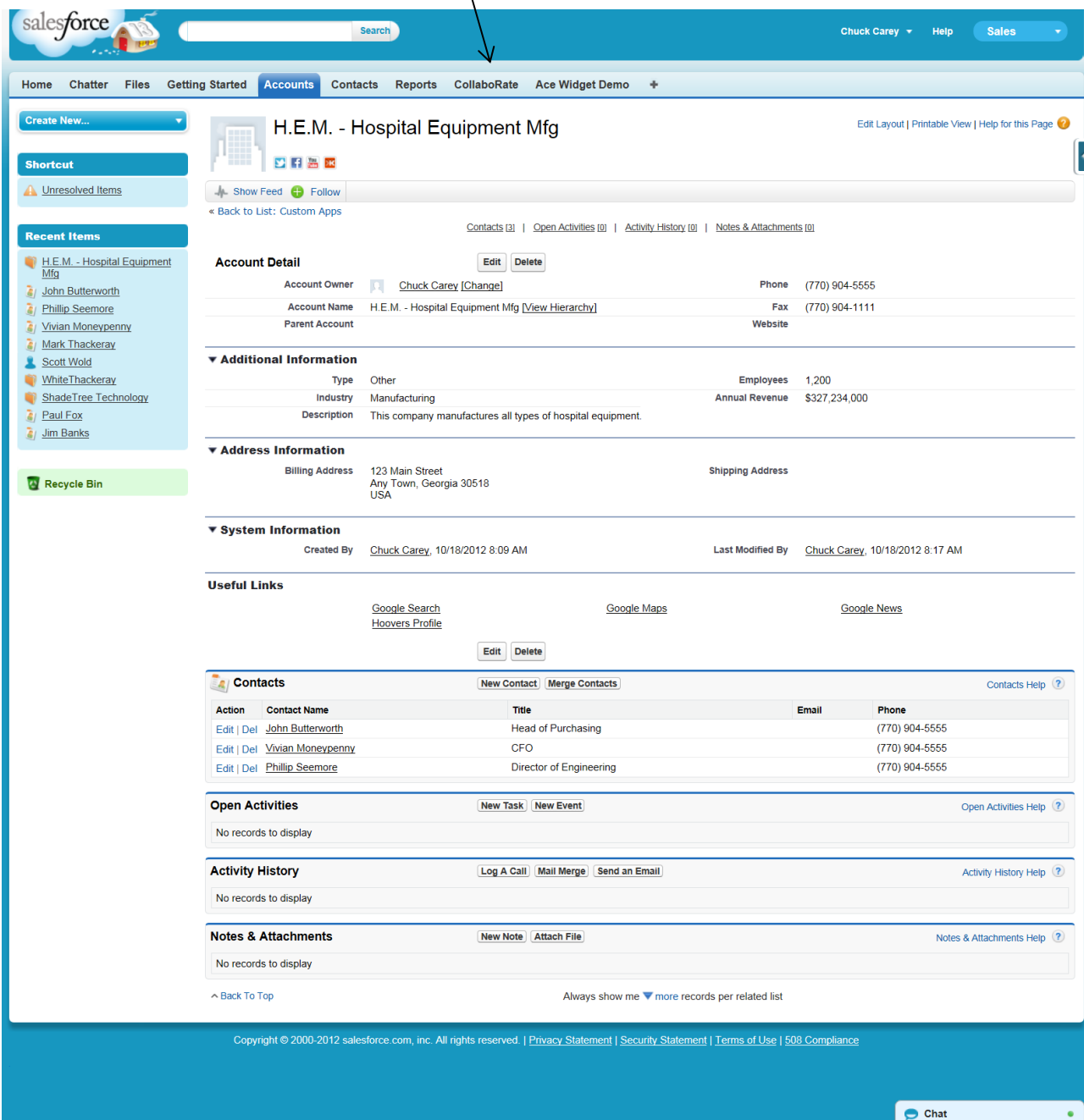# Typical example of how CollaboRate improves the sales process in Salesforce.com

Below is a typical account profile inside Salesforce.com and the Salesrep is calling on a hospital equipment manufacturing company to sell them on their Ace Widget products. So from within this screen the rep wants to check out whom else they have sold to and whether they would be a good reference account. So he clicks on the CollaboRate tab and goes to the Reference section of the Customer Voice module in CollaboRate and requests all accounts that manufacture hospital equipment.

As mentioned, above references are found in the Customer Voice module of CollaboRate and the results for the search are displayed with highlights to help the rep select the reference that best fits their need.

The rep has chosen Stryker Medical as the best reference to fit his need and, in the example below, is able to open up the contacts there. He can then call in advance to ask questions and make sure they are still a good reference. Notice that there is an abundance of additio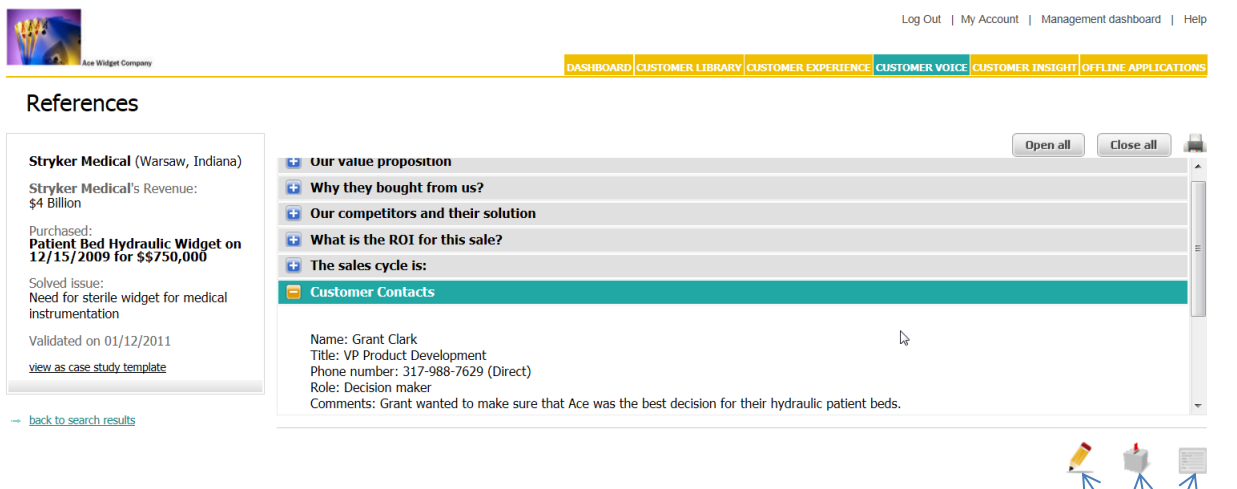nal information available and the rep can also tag this content, so it will be easier to find. He can make suggestions for improvement and can rate it, on the quality and value he believes it provides:
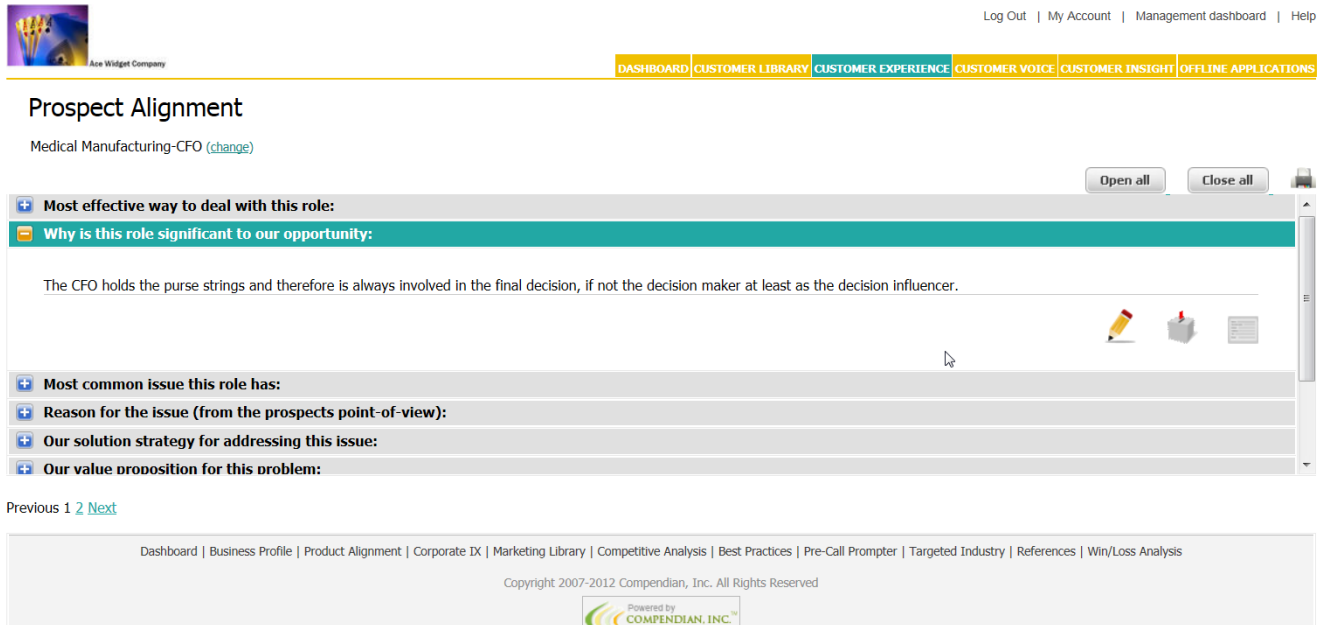
These Icons represent suggestions, rating and tagging.

Now that the rep knows who his reference is going to be, he wants to call on the CFO for H.E.M. and before he does, he uses CollaboRate to check out what they have learned from calling on CFO's in Medical Manufacturing companies in the past. He goes to the Customer Experience Module in CollaboRate and selects the Prospect Alignment option from the drop-down menu. He then selects the role of CFO and is presented with the following options he can open, to learn more about this role and why this role is significant to his opportunity. Plus, he is presented with more information to help them better prepare for the call. You will notice that the option to rate, make suggestions and tag this information is presented throughout the product.

Ace Widget Company

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DASHBOARD CUSTOMER LIBRARY CUSTOMER EXPERIENCE CUSTOMER VOICE CUSTOMER INSIGHT OFFLINE APPLICATIONS

Prospect Alignment

Medical Manufacturing-CFO (change)

[Open all] [Close all]

- **Most effective way to deal with this role:**
- **Why is this role significant to our opportunity:**

  The CFO holds the purse strings and therefore is always involved in the final decision, if not the decision maker at least as the decision influencer.

- **Most common issue this role has:**
- **Reason for the issue (from the prospects point-of-view):**
- **Our solution strategy for addressing this issue:**
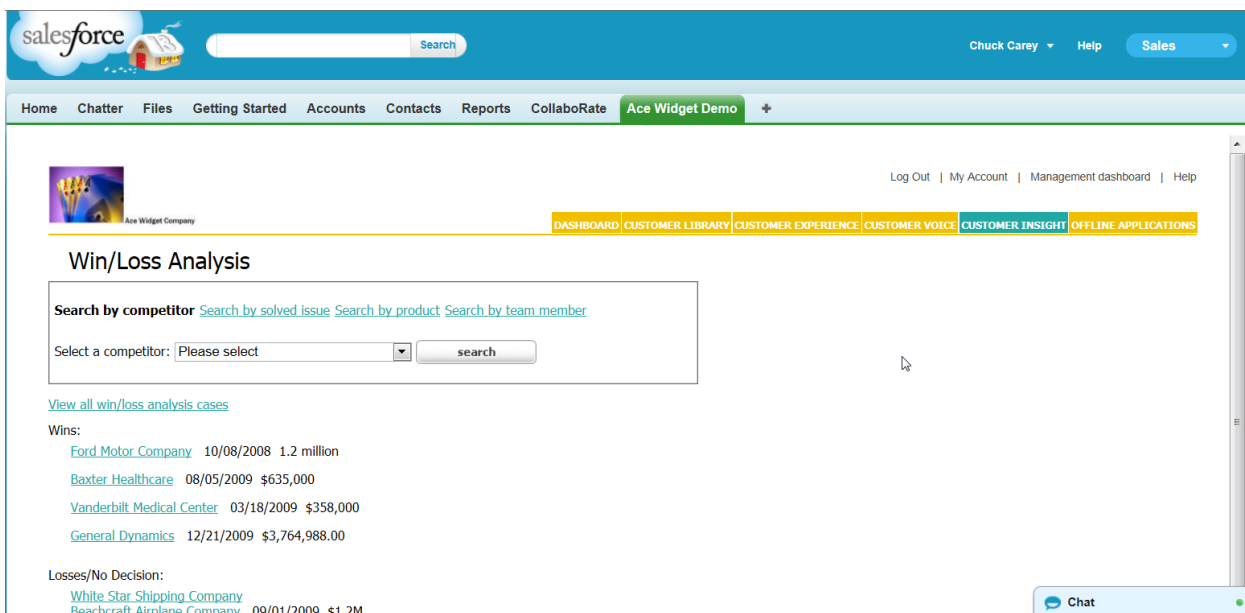- **Our value proposition for this problem:**

Previous 1 2 Next

Dashboard | Business Profile | Product Alignment | Corporate IX | Marketing Library | Competitive Analysis | Best Practices | Pre-Call Prompter | Targeted Industry | References | Win/Loss Analysis
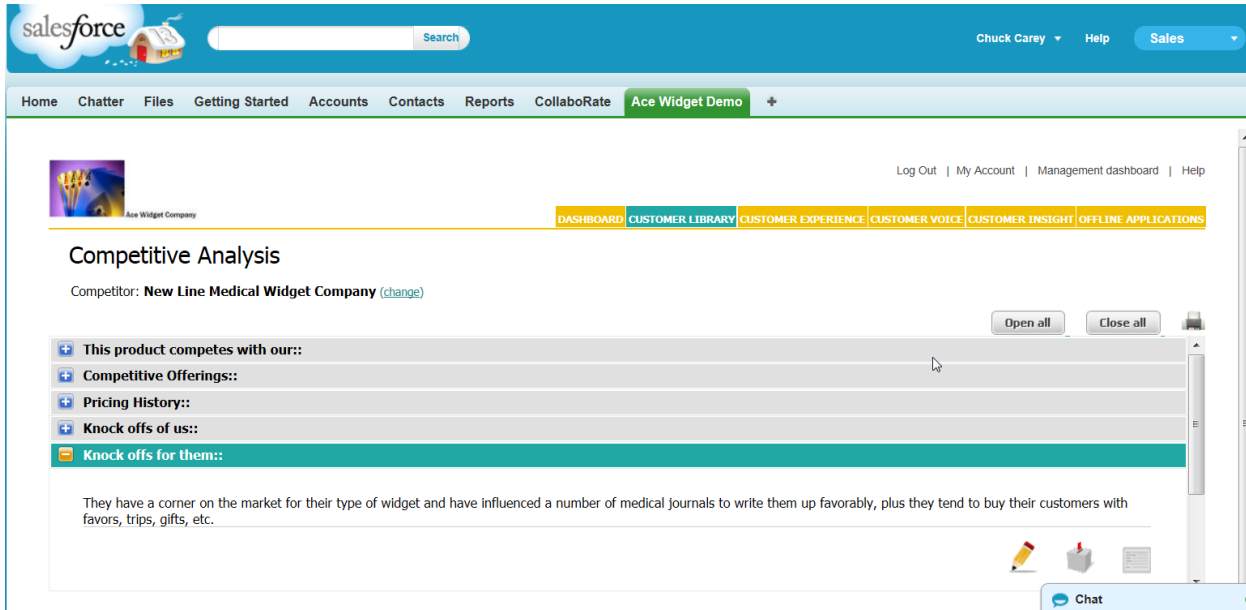
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Next, our rep wanted to check to see what medical opportunities his company competed in, were won – lost, or were still hanging out there to be closed. So he went to the Customer Insight Module and clicked on Win/Loss Analysis and was presented with the following results:

salesforce

Search

Chuck Carey ▼   Help   Sales ▼

Home   Chatter   Files   Getting Started   Accounts   Contacts   Reports   CollaboRate   **Ace Widget Demo**   +

Ace Widget Company

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DASHBOARD CUSTOMER LIBRARY CUSTOMER EXPERIENCE CUSTOMER VOICE CUSTOMER INSIGHT OFFLINE APPLICATIONS

Win/Loss Analysis

Search by competitor Search by solved issue Search by product Search by team member

Select a competitor: [Please select ▼]   [search]

View all win/loss analysis cases

Wins:

Ford Motor Company   10/08/2008 1.2 million

Baxter Healthcare   08/05/2009 $635,000

Vanderbilt Medical Center   03/18/2009 $358,000

General Dynamics   12/21/2009 $3,764,988.00

Losses/No Decision:
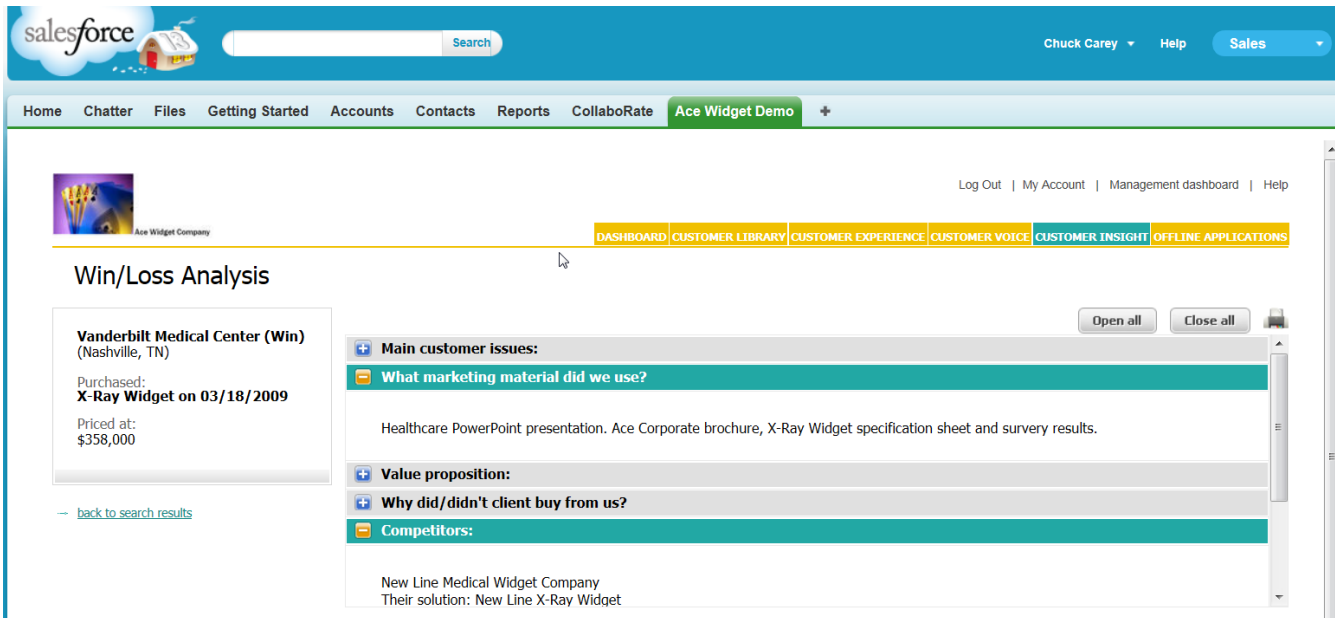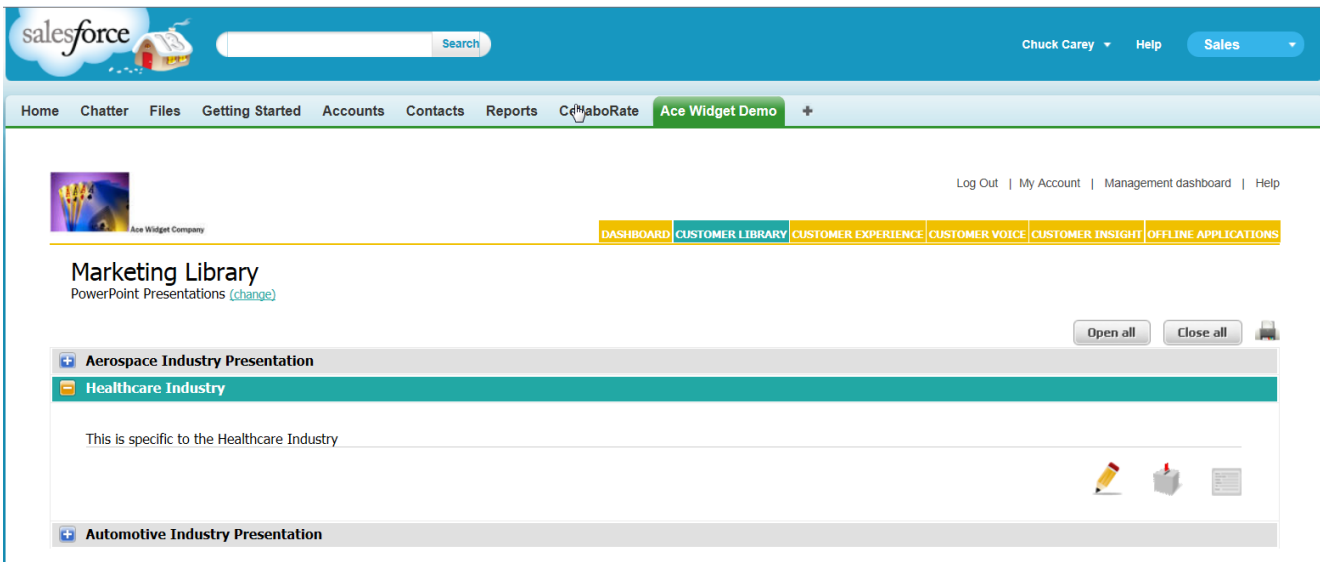
White Star Shipping Company

Beachcraft Airplane Company   09/01/2009 $1.2M

💬 Chat

At this point, he can click on Baxter Healthcare or Vanderbilt Medical Center to see what the results were:

Once inside, the rep can open up those fields that he wants more information on. In this case he wanted to know who their competitors were and what marketing collateral was used, and check both of those out. He then goes to the Customer Library Module first to check out the Healthcare PowerPoint:

Just like every other section CollaboRate empowers the user to rate, suggest or tag this information. So he chooses to rate this content and then tag it:

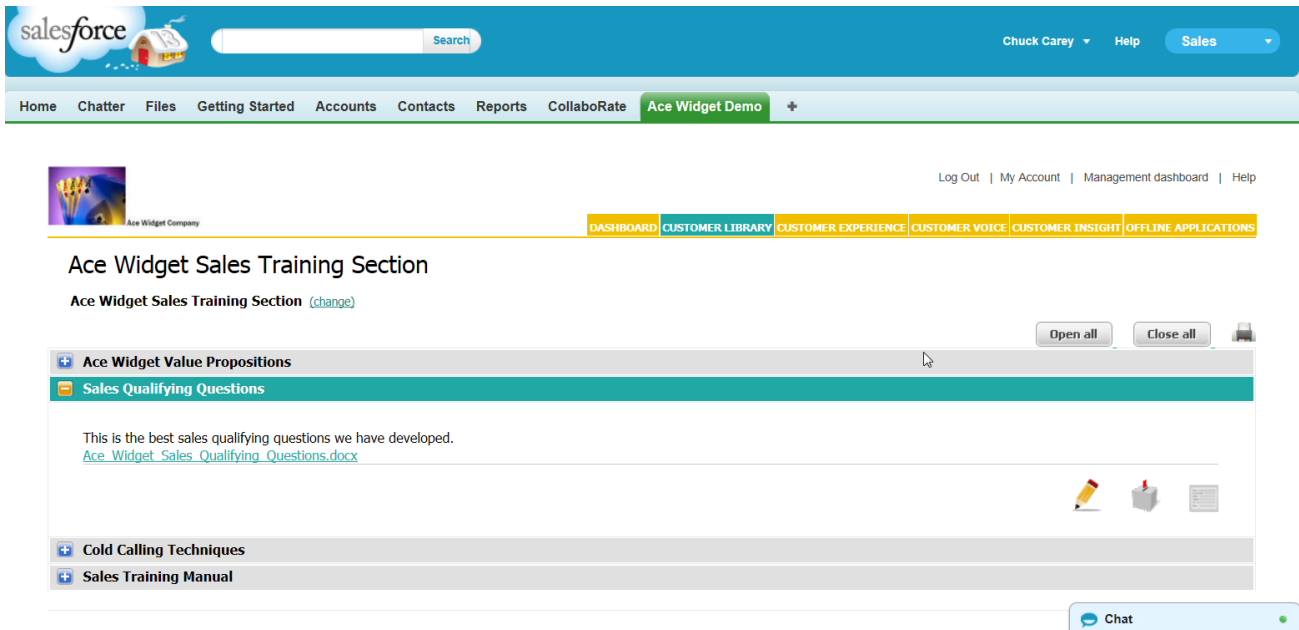Now that he has rated and tagged this information as Medical, he can find it faster when he does a search. CollaboRate allows users to tag multiple pieces of content, with the same tag, so they can all be grouped together and found with a single search. Next, he wants to check into the competition that was listed, to see what they are offering and how he can best compete with them. The rep clicks on the Competitive Analysis section of the Customer Library Module and then selects the appropriate competitor. This template provides a number of options related to the Competitor that would be important to everyone. The user can open any or all of them, print them out, or just view them as shown in the following illustration:
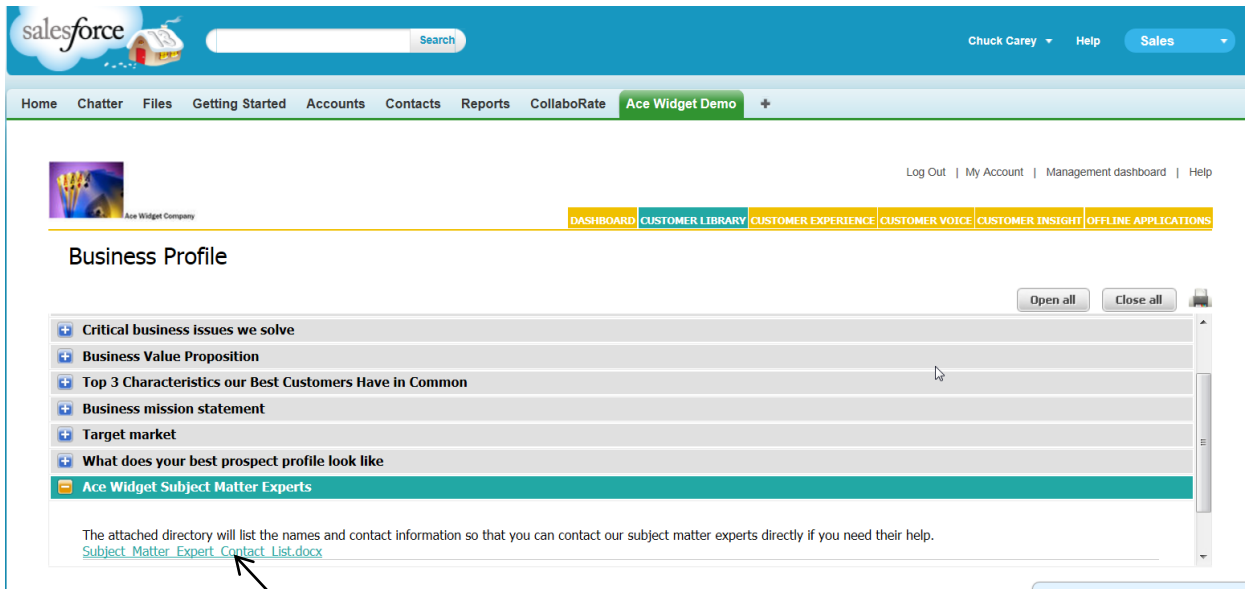
One last thing that the rep wants to check out before he makes his call, is to look at the sample qualifying questions he should ask once he gets in front of the prospect. CollaboRate provides a User Configurable section in each module to allow the client to configure and use that section for whatever they need or want. So Ace Widgets created a Training Section in the Customer Library Module:
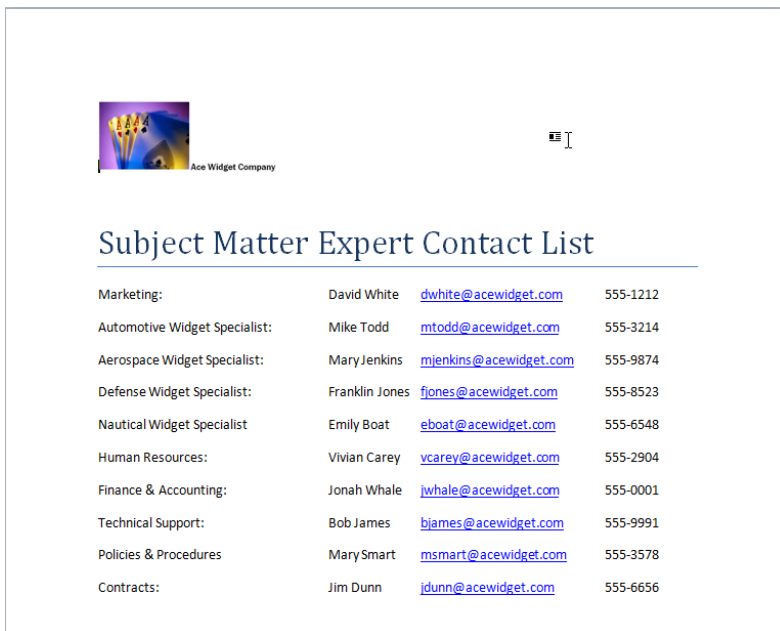

Since CollaboRate is cloud-based like Salesforce.com, all of the content, documents and collateral, are stored in the cloud, so it can be accessed 24/7 from anywhere the rep has access to the internet. CollaboRate allows the user to download, view, print and even e-mail the content, but it doesn't allow the user to modify and re-upload that modified document back into the Compendian/CollaboRate library. This maintains document integrity.

In making the presentation to the prospect, an issue came up that required the rep to get more information and he needed to contact an in-house subject matter expert. That list was stored in the Business Profile section of the Customer Library Module:

When he clicks on the document, the results are pulled down from their secure cloud repository. The rep can either call the subject matter expert, or can click on their email address and send them an email right from within the document.

And that is how fast and easy it is for a salesperson to find what they want and prepare themselves to make the right impression and be more effective, without ever leaving their Salesforce.com session. They can access CollaboRate separately, if they choose to, outside of Salesforce.com, the choice is up to them.