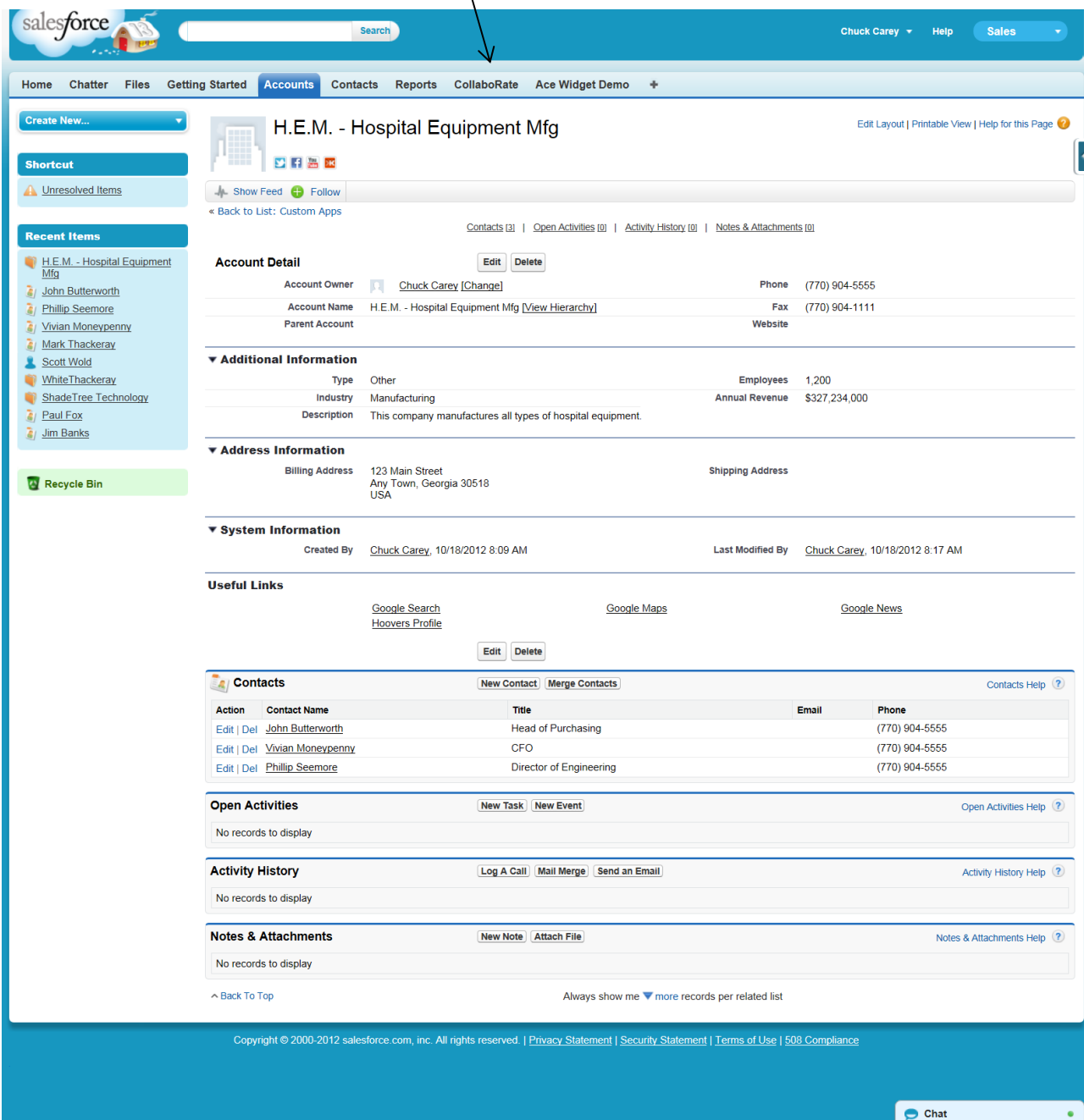


Typical example of how CollaboRate improves the sales process in Salesforce.com

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:



The screenshot shows the Salesforce interface for the account 'H.E.M. - Hospital Equipment Mfg'. The top navigation bar includes tabs for Home, Chatter, Files, Getting Started, **Accounts**, Contacts, Reports, **CollaboRate**, and Ace Widget Demo. An arrow points to the 'CollaboRate' tab. The left sidebar shows a 'Recent Items' list with 'H.E.M. - Hospital Equipment Mfg' at the top. The main content area displays the account details, including account owner (Chuck Carey), phone, fax, website, and additional information like industry (Manufacturing) and annual revenue (\$327,234,000). Below the account details are sections for 'Useful Links', 'Contacts', 'Open Activities', 'Activity History', and 'Notes & Attachments'.

Account Detail

Account Owner	Chuck Carey [Change]	Phone	(770) 904-5555
Account Name	H.E.M. - Hospital Equipment Mfg [View Hierarchy]	Fax	(770) 904-1111
Parent Account		Website	

Additional Information

Type	Other	Employees	1,200
Industry	Manufacturing	Annual Revenue	\$327,234,000
Description	This company manufactures all types of hospital equipment.		

Address Information

Billing Address	123 Main Street Any Town, Georgia 30518 USA	Shipping Address	
-----------------	---	------------------	--

System Information

Created By	Chuck Carey, 10/18/2012 8:09 AM	Last Modified By	Chuck Carey, 10/18/2012 8:17 AM
------------	---------------------------------	------------------	---------------------------------

Useful Links

[Google Search](#) [Google Maps](#) [Google News](#)

Contacts

Action	Contact Name	Title	Email	Phone
Edit Del	John Butterworth	Head of Purchasing		(770) 904-5555
Edit Del	Vivian Moneypenney	CFO		(770) 904-5555
Edit Del	Phillip Seemore	Director of Engineering		(770) 904-5555

Open Activities

No records to display

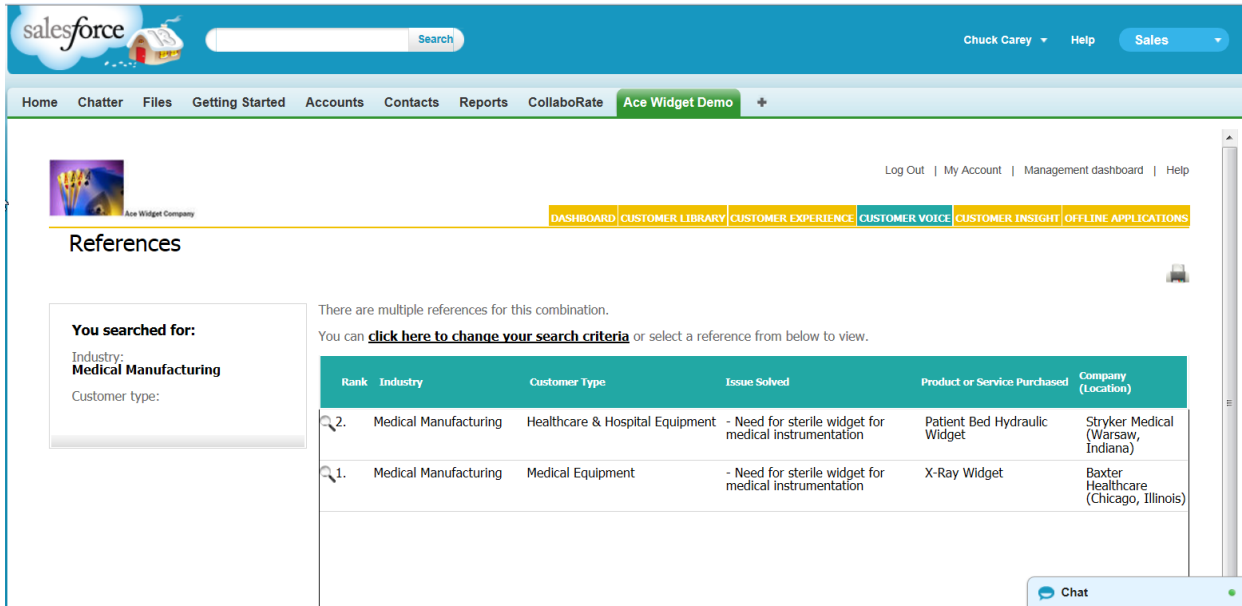
Activity History

No records to display

Notes & Attachments

No records to display

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.



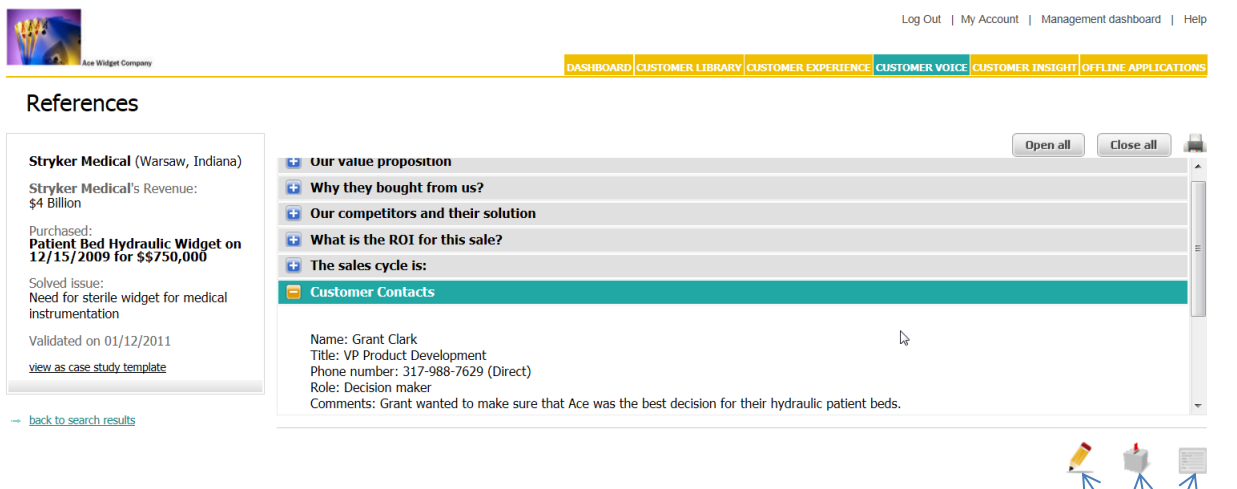
References

You searched for:
 Industry: **Medical Manufacturing**
 Customer type:

There are multiple references for this combination.
 You can [click here to change your search criteria](#) or select a reference from below to view.

Rank	Industry	Customer Type	Issue Solved	Product or Service Purchased	Company (Location)
2.	Medical Manufacturing	Healthcare & Hospital Equipment	- Need for sterile widget for medical instrumentation	Patient Bed Hydraulic Widget	Stryker Medical (Warsaw, Indiana)
1.	Medical Manufacturing	Medical Equipment	- Need for sterile widget for medical instrumentation	X-Ray Widget	Baxter Healthcare (Chicago, Illinois)

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 additional 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:



References

Stryker Medical (Warsaw, Indiana)
 Stryker Medical's Revenue: \$4 Billion
 Purchased: **Patient Bed Hydraulic Widget on 12/15/2009 for \$5750,000**
 Solved issue: Need for sterile widget for medical instrumentation
 Validated on 01/12/2011
[view as case study template](#)

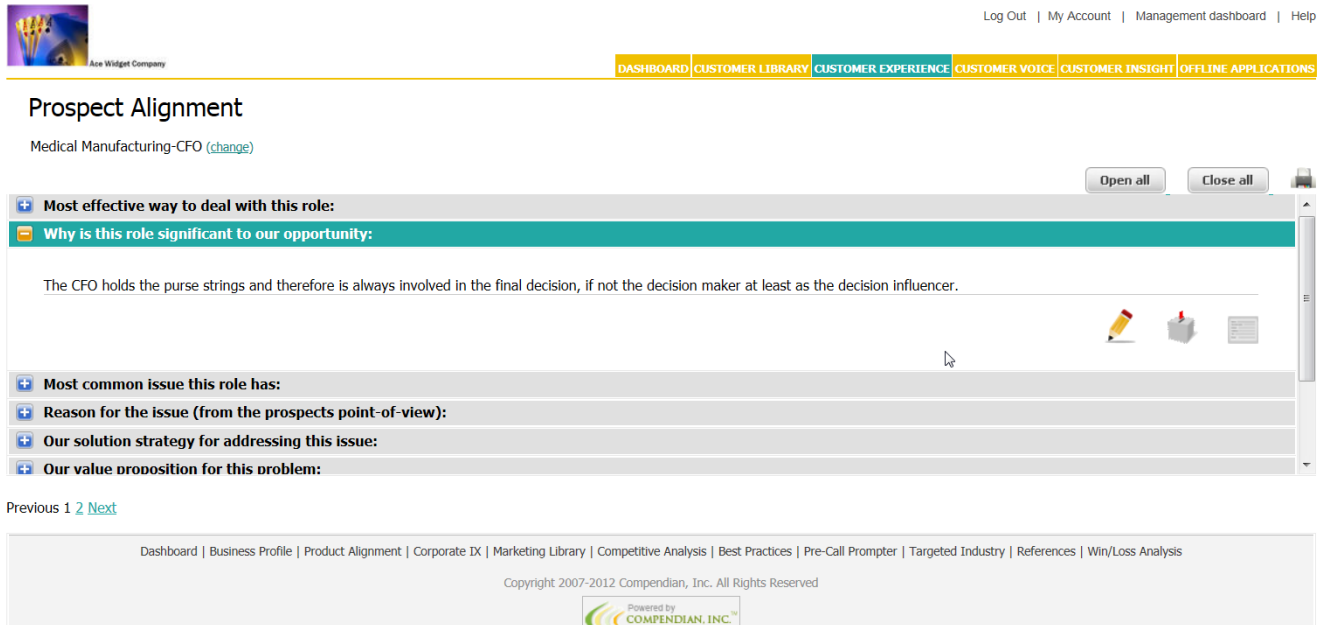
Our value proposition
Why they bought from us?
Our competitors and their solution
What is the ROI for this sale?
The sales cycle is:

Customer Contacts

Name: Grant Clark
 Title: VP Product Development
 Phone number: 317-988-7629 (Direct)
 Role: Decision maker
 Comments: Grant wanted to make sure that Ace was the best decision for their hydraulic patient beds.

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.



Prospect Alignment
 Medical Manufacturing-CFO ([change](#))

Log Out | My Account | Management dashboard | Help

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:

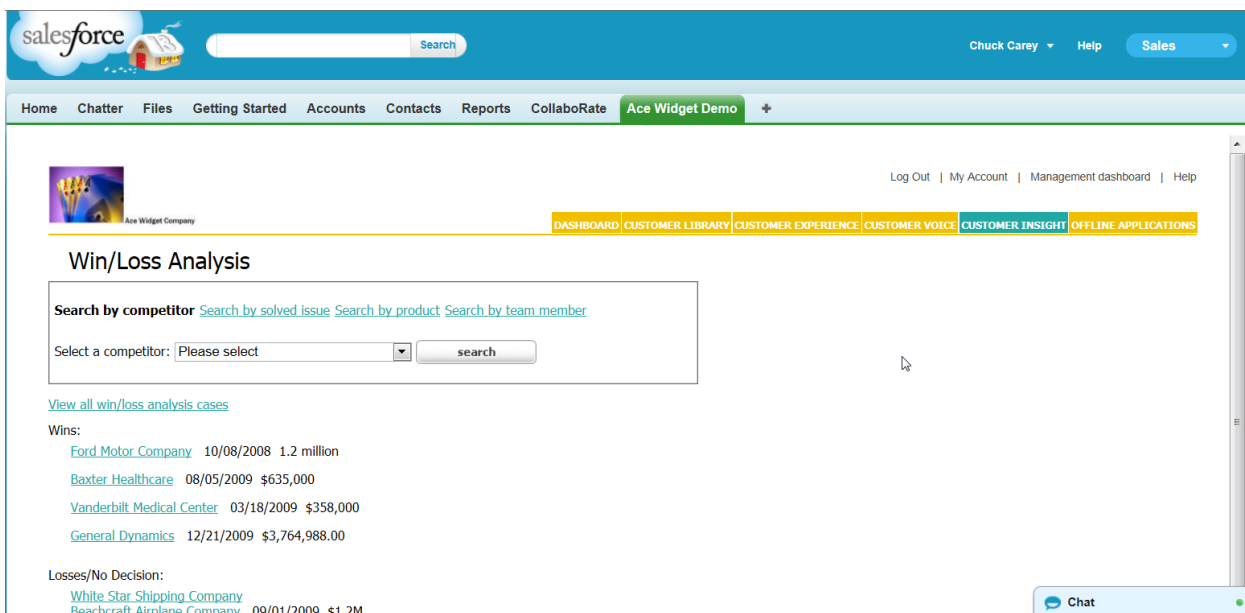
Previous 1 2 Next

Dashboard | Business Profile | Product Alignment | Corporate IX | Marketing Library | Competitive Analysis | Best Practices | Pre-Call Prompter | Targeted Industry | References | Win/Loss Analysis

Copyright 2007-2012 Compendian, Inc. All Rights Reserved

Powered by **COMPENDIAN, INC.**

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:



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:

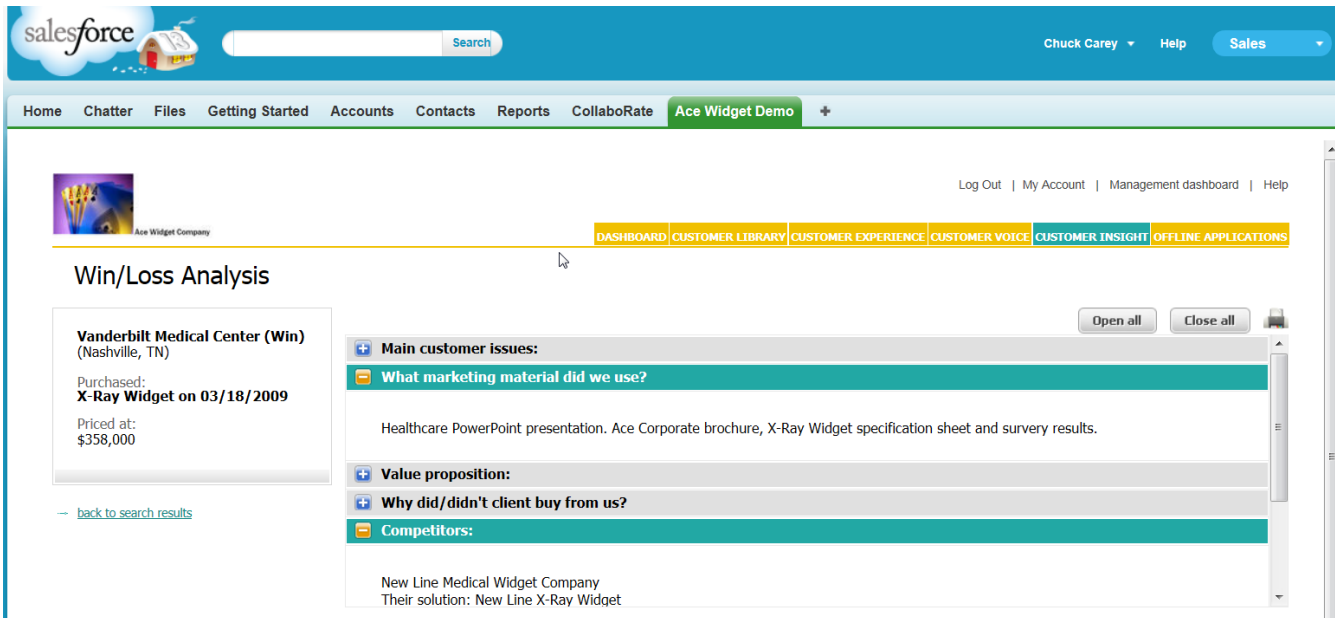
White Star Shipping Company	09/01/2009	\$1.2M
Beachcraft Airplane Company	09/01/2009	\$1.2M

Log Out | My Account | Management dashboard | Help

DASHBOARD CUSTOMER LIBRARY CUSTOMER EXPERIENCE CUSTOMER VOICE CUSTOMER INSIGHT OFFLINE APPLICATIONS

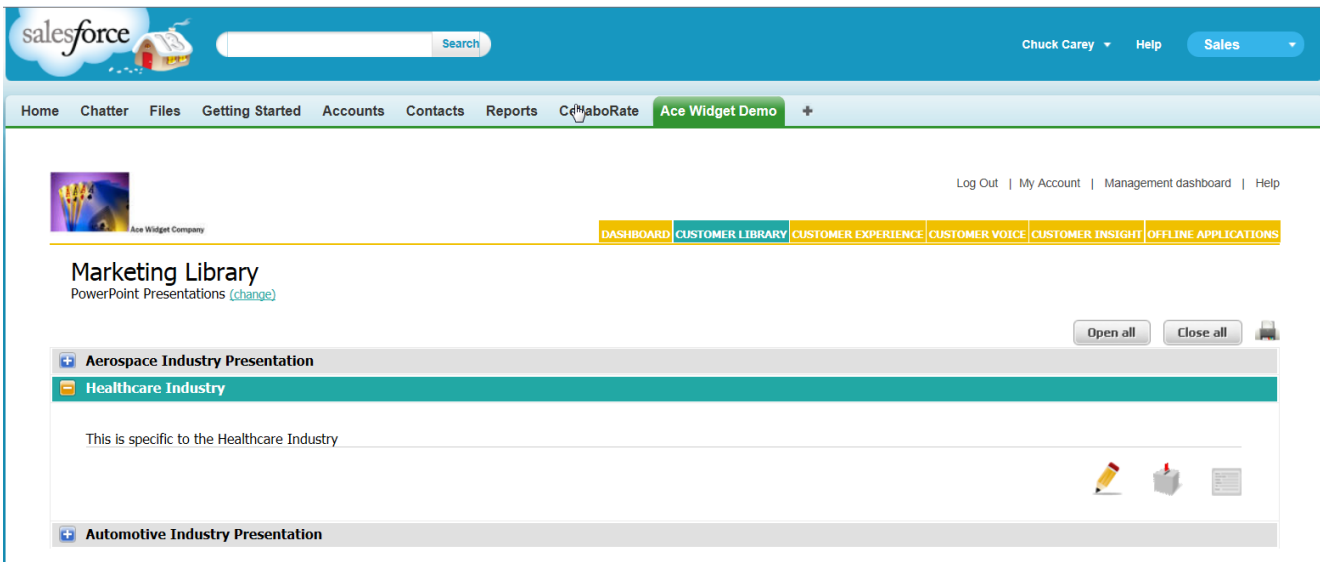
Chat

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



The screenshot shows the Salesforce interface with the 'Ace Widget Demo' tab selected. The 'Win/Loss Analysis' section is active, displaying details for 'Vanderbilt Medical Center (Win)'. The analysis includes the purchase date (03/18/2009), price (\$358,000), and a list of main customer issues. The issues are categorized into 'What marketing material did we use?', 'Value proposition', 'Why did/didn't client buy from us?', and 'Competitors:'. The 'Competitors' section lists 'New Line Medical Widget Company' and 'Their solution: New Line X-Ray Widget'.

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:



The screenshot shows the Salesforce interface with the 'CollaboRate' tab selected. The 'Marketing Library' section is active, displaying a list of presentations. The 'Healthcare Industry' presentation is selected, showing the text 'This is specific to the Healthcare Industry'. The interface includes buttons for 'Open all' and 'Close all'.

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:

Log Out | My Account | Management dashboard | Help

ANCE | CUSTOMER VOICE | CUSTOMER INSIGHT | OFFLINE APPLICATIONS

Open all Close all

Targeted Industry | References | Win/Loss Analysis

Chat

Marketing Library
PowerPoint Presentations ([change](#))

Aerospace Industry Presentation

Healthcare Industry

This is specific to the Healthcare Industry

Automotive Industry Presentation

Dashboard | Business Profile | Product Alignment | Co

Your last rating for this content was:

How would you rate the usefulness of this content?

Poor 1 2 3 4 5 Outstanding

Comments Tell us why you rated the content this way.

Characters remaining: 1024

Reason For Rating

	Yes	No
Helped me to close an Opportunity	<input checked="" type="radio"/>	<input type="radio"/>
Gave me Important Company Info	<input checked="" type="radio"/>	<input type="radio"/>

Submit

Rating Level
0.00/5

Page Ratings

0 Total Rating

Top Ratings

Rate By	Date
NONE	

CLOSE

Log Out | My Account | Management dashboard | Help

ANCE | CUSTOMER VOICE | CUSTOMER INSIGHT | OFFLINE APPLICATIONS

Open all Close all

Targeted Industry | References | Win/Loss Analysis

Chat

Marketing Library
PowerPoint Presentations ([change](#))

Aerospace Industry Presentation

Healthcare Industry

This is specific to the Healthcare Industry

Automotive Industry Presentation

Dashboard | Business Profile | Product Alignment | Co

Post Tags

Separate Tags with Commas

Medical **Add Tag**

Choose from the most used tags in Post Tags.

Aerospace Automotive Best practices Brochures

Common Objections **Competitor** Cover Page Defense Dir. of

Purchasing Defense Dog Hydro Widget Medical Mobile Most common

Issues Pharmaceutical Qualifying Questions Stryker Updates Value Prop for

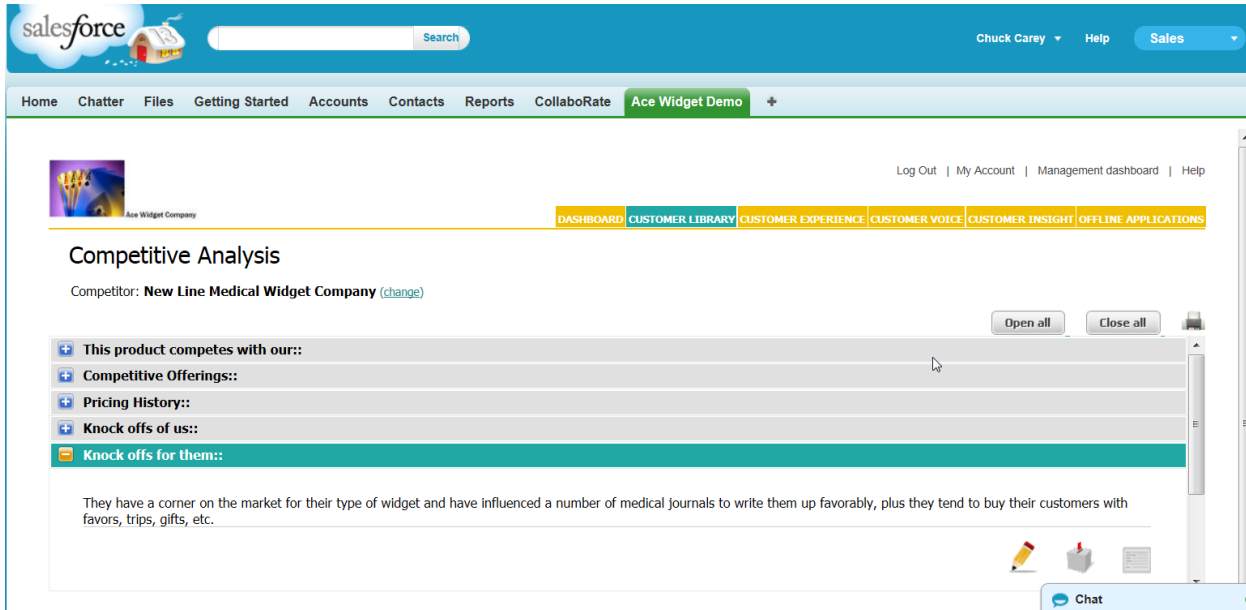
Defense Video

CLOSE

Copyright 2007-2012 Compendian, Inc. All Rights Reserved

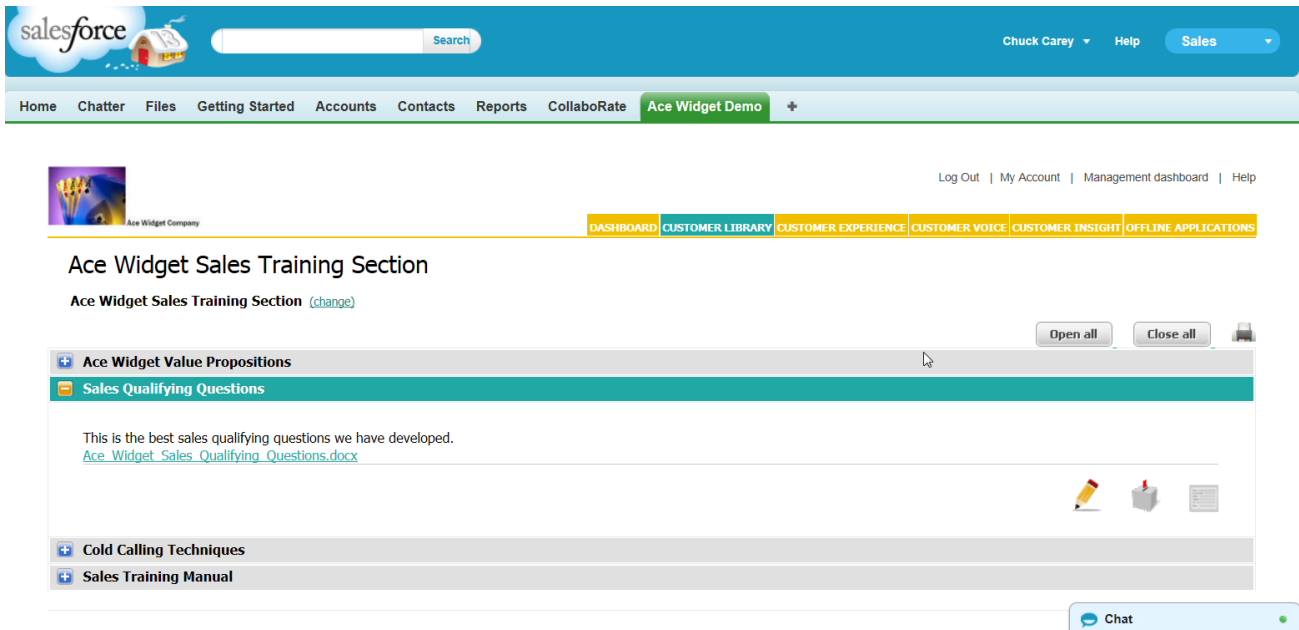
Powered by **COMPENDIAN, INC.**

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:



The screenshot shows the Salesforce interface with the 'Ace Widget Demo' tab selected. The 'Competitive Analysis' section is displayed, showing a list of competitive offerings and pricing history. The 'Competitive Offerings' section is expanded, showing a table with columns for 'Competitive Offerings', 'Pricing History', and 'Knock offs of us:'. The 'Knock offs of us:' section is also expanded, showing a list of knock offs. The 'Knock offs for them:' section is also expanded, showing a list of knock offs. The 'Open all' and 'Close all' buttons are visible at the top right of the section.

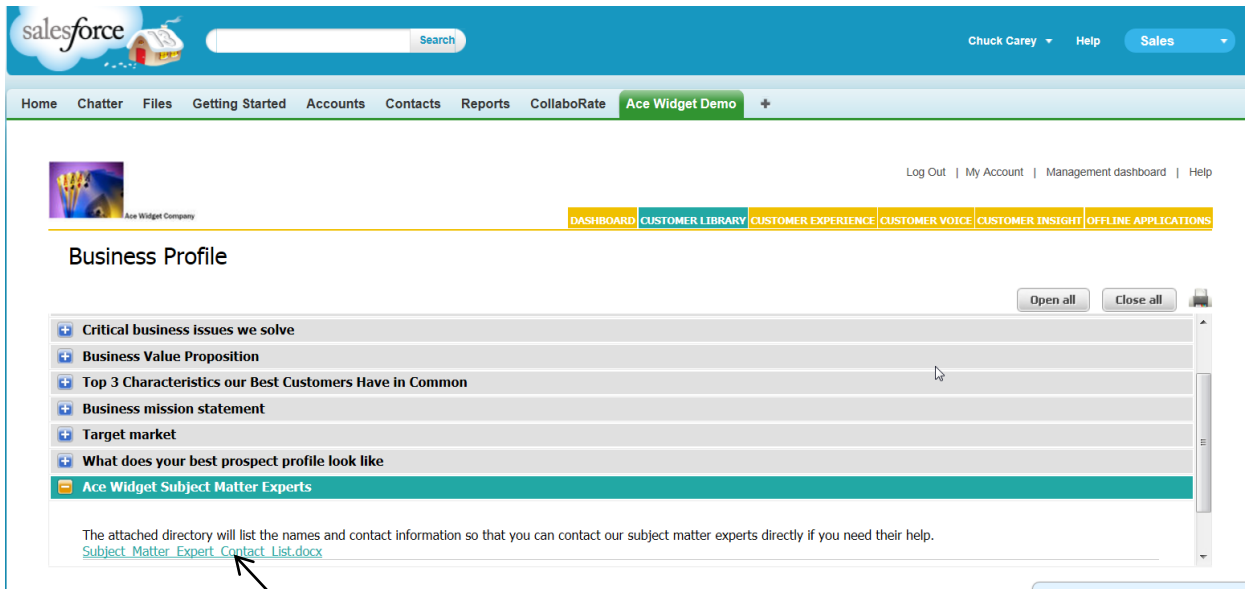
One last thing that the rep wants to check out before he makes his call, is to look at the sample qualifying questions he should ask once he gets in front of the prospect. CollaboRate provides a User Configurable section in each module to allow the client to configure and use that section for whatever they need or want. So Ace Widgets created a Training Section in the Customer Library Module:



The screenshot shows the Salesforce interface with the 'Ace Widget Demo' tab selected. The 'Ace Widget Sales Training Section' is displayed, showing a list of training materials. The 'Sales Qualifying Questions' section is expanded, showing a list of sales qualifying questions. The 'Cold Calling Techniques' and 'Sales Training Manual' sections are also visible. The 'Open all' and 'Close all' buttons are visible at the top right of the section.

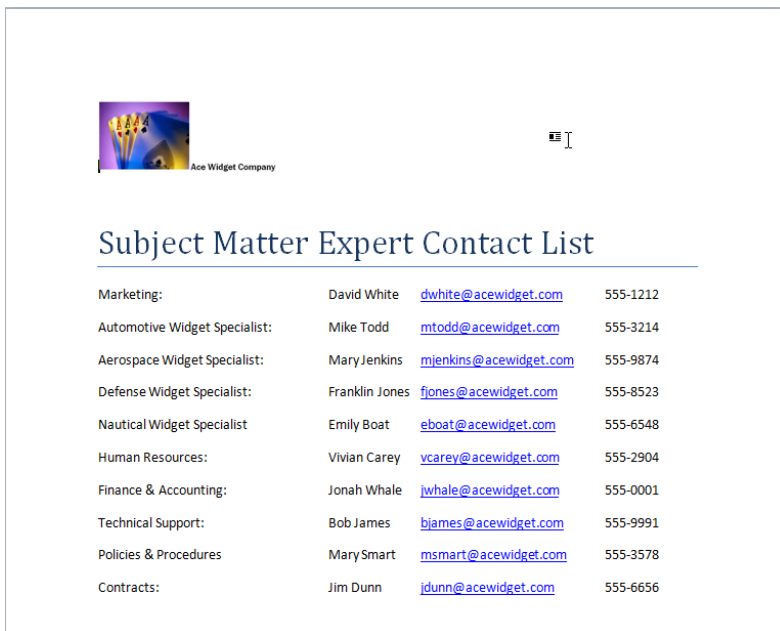
Since CollaboRate is cloud-based like Salesforce.com, all of the content, documents and collateral, are stored in the cloud, so it can be accessed 24/7 from anywhere the rep has access to the internet. CollaboRate allows the user to download, view, print and even e-mail the content, but it doesn't allow 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:



The screenshot shows the Salesforce interface with the 'Business Profile' section expanded. The 'Ace Widget Subject Matter Experts' document is selected, and the 'Subject_Matter_Expert_Contact_List.docx' link is visible. An arrow points to this link.

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.



The screenshot shows the 'Subject Matter Expert Contact List' document. It displays a table with contact information for various departments, including Marketing, Automotive Widget Specialist, Aerospace Widget Specialist, Defense Widget Specialist, Nautical Widget Specialist, Human Resources, Finance & Accounting, Technical Support, Policies & Procedures, and Contracts.

Department	Name	Email	Phone
Marketing:	David White	dwhite@acewidget.com	555-1212
Automotive Widget Specialist:	Mike Todd	mtodd@acewidget.com	555-3214
Aerospace Widget Specialist:	Mary Jenkins	mjenkins@acewidget.com	555-9874
Defense Widget Specialist:	Franklin Jones	fjones@acewidget.com	555-8523
Nautical Widget Specialist	Emily Boat	eboat@acewidget.com	555-6548
Human Resources:	Vivian Carey	vcarey@acewidget.com	555-2904
Finance & Accounting:	Jonah Whale	jwhale@acewidget.com	555-0001
Technical Support:	Bob James	bjames@acewidget.com	555-9991
Policies & Procedures	Mary Smart	msmart@acewidget.com	555-3578
Contracts:	Jim Dunn	jdunn@acewidget.com	555-6656

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.