



# PRODUCT GUIDE

## Overview

Pivotal's CRM product suite is complete. It addresses the entire scope of CRM — sales, marketing, service, interactive selling and partner relationship management. We have the right partners and services in place to meet all of your consulting, integration, platform and complimentary technology needs.

The complete Pivotal CRM suite is broad, without the excessive depth that makes humongous CRM inflexible. Pivotal delivers a sensible set of commonly needed features out-of-the-box, built on an Intelligent Internet Architecture™ that gives companies the flexibility to quickly customize their solution to match their business processes.

Pivotal CRM Suite				
Sales	Marketing	Service	Interactive Selling	Partner Management
Pivotal Sales™	Pivotal Marketing™	Pivotal Service™	Pivotal eSales™	Pivotal ePartner™
Pivotal Contact Center™	Pivotal Contact Center™	Pivotal Contact Center™	Pivotal Configurator™ Pivotal Advisor™	Pivotal Partner Management™
Pivotal Sales™ – Miller Heiman Edition	Pivotal eMarketing™ Pivotal Marketing Analytics™	Pivotal eService™ Pivotal Wireless™ for Service Pivotal Service Analytics™	Pivotal Quoter™ Pivotal Catalog™	Pivotal Partner Analytics™
Pivotal Wireless™ for Sales				
Pivotal Sales Analytics™				

## Pivotal Intelligent Internet Architecture™

## Product Suites and Product Descriptions

Pivotal's complete CRM suite consists of five main product suites: Pivotal Sales, Pivotal Marketing, Pivotal Service, Pivotal Interactive Selling, and Pivotal Partner Relationship Management. Each suite is composed of a number of key products that can be extended through product options.

### 1. Pivotal Sales

Pivotal Sales provides critical customer information, opportunity management tools, and "best practices" sales methodologies for the enterprise sales force. The core capabilities of the Pivotal Sales product suite include:

- Quote and Proposal Management
- Consolidated Revenue Forecast
- Territory Management
- Opportunity Management
- Team-Selling Enablement
- Best Practices Enablement
- Multi-Channel Sales Integration
- Real-Time Product Configuration
- Expense Management
- Sales Efficiency Tools
- Campaign Management
- Web-based Collaborative Services
- Up/Cross-Selling Automation
- Competitive and Industry Intelligence

### Sales Products/Descriptions

**Pivotal Sales™** enables global sales organizations to sell collaboratively across multiple regions, currencies, and channels. With Pivotal Sales, organizations can share information across sales teams, accurately forecast their business, manage pipelines, automatically generate quotes and proposals, and easily configure products and services that meet specific customer needs.

**Pivotal Contact Center™** combines Sales, Marketing, Service and Support in a single interface to provide Agents with access to sales opportunities, order entry and quotation management tools that can help them better identify, qualify and close sales opportunities. In addition, Pivotal Contact Center allows Agents to process orders and develop quotes with a higher degree of accuracy and consistency through business policy and procedure enforcement.

**Pivotal Sales™ — Miller Heiman Edition** is an option for the Pivotal Sales application based on the three most popular disciplines — Strategic Selling, Conceptual Selling, and Large Account Management — as taught by Miller Heiman, a leader in sales methodologies.

**Pivotal Wireless™ for Sales** enables mobile employees real-time read and write access to critical customer data. Using wireless, hand held devices such as web-enabled cell phones, personal digital assistants (PDAs) and two-way pagers, mobile employees can make informed, timely decisions that result in immediate response to opportunities and increased sales while in the field.

**Pivotal Sales Analytics™** is an analytics package that provides sales professionals with a Web-based tool for data mining and forecast analysis. With the ability to analyze sales history, order history, market trends, etc. at their fingertips, sales managers can accurately forecast across all channels, analyze sales performance by region, identify trends in sales cycle, and extract the knowledge and insight to drive better business decisions.

## 2. Pivotal Marketing

Pivotal Marketing gives enterprises the information and processes they need to analyze their customers' lifecycles, identify diverse opportunities, and maximize the most profitable relationships. Core capabilities of the Pivotal Marketing product suite include:

- Campaign Management
- Lead Capturing and Tracking
- Centralized Data Repository
- Forecasting: Campaign Impact, Market Shifts and Customer Perception
- Customer Profiling
- Event Management
- ROI Calculation and Analysis
- Best Practices
- Data Mining
- Customer Analysis
- Direct Mail Campaign Management
- Collaborative Action Plans

### Products/Description

**Pivotal Marketing™** delivers a closed-loop marketing solution that includes campaign design, collaborative marketing action plans, campaign execution and lead tracking across multiple channels (phone, direct mail, Web, email) for direct and partner channels. With Pivotal Marketing, marketing professionals maximize profitability through one-to-one marketing strategies that deliver optimal customer acquisition, retention, cross-selling and up-selling results.

**Pivotal Contact Center™** combines Sales, Marketing, Service and Support in a single interface, facilitating coordination between marketing and service in order to coordinate targeted outbound marketing campaigns, capture leads, gather customer feedback, and capitalize on cross-sell and up-sell opportunities.

**Pivotal eMarketing™** extends the power of our Pivotal Marketing product to the Internet. Pivotal eMarketing allows companies to take advantage of the cost-effectiveness of internet-based marketing through online marketing research, lead capturing and tracking, collateral distribution and management, and email campaign management. Seamless integration with Pivotal Marketing ensures that organizations can provide a consistent and personalized marketing experience.

**Pivotal Marketing Analytics™** is an analytics package that provides marketing professionals with a Web-based tool for data mining and data analysis. With the ability to analyze customer profiles, purchasing history, product preferences, market trends, etc. at their finger tips, marketing managers can better understand their customer buying preferences, product profitability, campaign effectiveness and have the knowledge and insight to more effectively target prospects and drive better business decisions.

### 3. Pivotal Service

Pivotal Service provides customer service professionals with a robust solution to efficiently capture, track, manage, escalate, and resolve customer service or support requests. Core capabilities of the Pivotal Service product suite include:

- Integrated Communication Platform
- Multi-Channel Interactions
- End-to-End Reporting
- Service Request Management
- Online Request Tracking and Escalation
- Service-to-Order Integration
- Personalized, 24x7 Self-Service
- Online FAQ
- IVR Self-Service
- Knowledge Base Management
- Sales/Marketing Integration
- Market-Driven Product Enhancement
- Time and Activity Management
- Productivity and Performance Monitoring and Reporting

#### Service Products/Descriptions

**Pivotal Service™** is a Web-based customer service application for employees that enables companies to build customer loyalty, increase revenues and optimize call center performance. Pivotal Service automates the capture, management and resolution of customer service and support requests across multiple channels. It integrates with Sales and Marketing to provide service professionals with the tools and information they need to deliver personalized service for improved customer satisfaction.

**Pivotal Contact Center™** combines Sales, Marketing, Service and Support in a single interface, transforming call centers into next-generation contact centers that support multi-channel customer interactions via voice, email, online chat, Web collaboration, fax and more. By managing customer interactions across all channels, service organizations have the tools and information they need to cost-effectively deliver excellence in customer service.

**Pivotal eService™** helps organizations to reduce the cost of service by extending service request management to the Internet. Pivotal eService supports inbound email management and provides a comprehensive, self-service Website for customers to quickly resolve their own problems through online knowledge base and FAQ, and the ability to create and review incidents, escalate to service experts, or to register products for future service.

**Pivotal Wireless™ for Service** enables mobile employees real-time read and write access to critical customer data using wireless, hand held devices such as Web-enabled cell phones, personal digital assistants (PDAs) and two-way pagers. Based on the Pivotal Intelligent Internet Architecture™, Pivotal Wireless offers a highly flexible solution easily tailored to your Service employee needs, to increase productivity, immediate response to incidents, service level agreements, increased customer satisfaction and up-sell opportunities anytime in the field.

**Pivotal Service Analytics™** provides service professionals with data analysis. With the ability to analyze customer service requests over various channels, service managers can better understand their customer preferences, resource utilization, service activity and performance and have the knowledge and insight to more effectively ensure customer satisfaction, manage their resources, and drive better business decisions.

## 4. Pivotal Interactive Selling

Pivotal Interactive Selling is a comprehensive product suite that enables companies to deliver a personalized online buying or selling experience for customers and sales professionals. Pivotal Interactive Selling simplifies the buying and selling experience of sophisticated products and services with interactive needs analysis and intelligent guided selling services.

Through Pivotal Interactive Selling, organizations increase sales effectiveness across all channels via comprehensive needs analysis, product cataloging, fixed and dynamic pricing, and configuration capabilities. Pivotal Interactive Selling has the following core capabilities:

- Data Repository: Product, Pricing, Sales Data
- Dynamic Proposals, Quotes, Reports, Orders
- Browser-Based Authoring Environment
- Catalog Management
- Configuration Management
- Guided Product, Pricing, Service Configuration
- Web-Based Product and Configuration Management
- Site Management
- Multi-Currency, Language
- Single Source Shipping and Tracking
- Quote and Proposal Management
- Multi-Channel Sales Management
- Integration to Supply Chain Management and Enterprise Resource Planning Systems

### Interactive Selling Products/Descriptions

**Pivotal eSales™** enables organizations to leverage the Internet as a cost-effective selling channel. With Pivotal eSales, organizations can leverage interactive selling integration to offer a rich and personalized online buying experience. Customers have access to rich product catalogs and product information and guided needs assessment support to help configure complex orders.

**Pivotal Configurator™** creates modeling of products, services, or processes using data, rules, constraints, relationships, and options. Pivotal Configurator provides a comprehensive solution that ensures complex orders and quotes are accurate, complete, and valid. It enforces business rules while delivering context-based messages that facilitate up-selling and cross-selling, leading to higher value orders. Used internally to improve sales productivity and order accuracy, or externally via a company's Website to help guide buyers through product selection and customization, Pivotal Configurator allows customers, employees and partners to configure the ideal solution for each customer's needs.

**Pivotal eAdvisor™** is designed to help customers select and purchase products and services via multiple channels. Pivotal eAdvisor helps companies to explore and understand the unique needs of each customer and advise on the specific recommendations that will meet those needs.

**Pivotal Quoter™** manages the ability to automatically generate quotations and proposals.

**Pivotal Catalog™** manages the database and publishing of product or solution offerings, their pricing and attributes, as well as the necessary sales encyclopedia of applicable product information.

## 5. Pivotal Partner Management™

Pivotal Partner Management™ empowers companies to more effectively manage their partner relationships. Pivotal Partner Management helps your partners to become collaborative members of your extended business team to generate sales, deliver customer value, and keep customers satisfied — while reducing the costs associated with managing your partners. Pivotal Partner Management creates a collaborative inter-company framework to exchange knowledge, manage relationships, and synchronize transactions over marketing, sales, service, and commerce processes.

The complete Pivotal Partner Management application suite consists of three components Pivotal ePartner, Partner Management, and Pivotal Partner Analytics. Core capabilities include:

- Partner Lifecycle Management
- Recruitment Management
- Partner Profiling
- Closed-loop Lead Management
- Sales Tools and Literature Fulfillment
- 24x7 Order Entry and Tracking
- Best Practice Action Plans
- Opportunity Management and Forecasting
- Marketing Management
- Knowledge Base Access
- Alliance Management
- Partner Performance Reporting and Analytics
- Personalized, Role-based Security

### Partner Relationship Management Products/Descriptions

**Pivotal ePartner™** is a browser-based solution that extends marketing, sales, service and ordering capabilities to business partners, enabling them to become effective members of your extended enterprise to generate sales, deliver customer value, and keep customers satisfied. In addition, the Pivotal ePartner ensures that partners are kept up to date by providing easy access to product information, training, sales tools, transaction data, and performance analysis reports.

**Pivotal Partner Management™** is a comprehensive, employee-facing base managing and enabling partner relationships and operations. Pivotal Partner Management enables organizations to build an effective partner ecosystem; collaboratively sell, service and market to end customers; and measure and reward the partner community.

**Pivotal Partner Analytics™** is an analytics package that provides channel managers with a Web-based tool for data mining and data analysis. With detailed information on the performance and profitability of the partner network by individual or segment, or regions, channel managers have the knowledge and insight they need to drive better business decisions.