



## Increasing Sales and Satisfaction

A UNIFIED WEB BASED SOLUTION THAT FUELS GROWTH



### ExSellece Delivers Sales Productivity

A sales and marketing team armed with ExSellece should be expected to increase its close rates and shortens its sales cycles. Companies with sales efforts that typically take place over an extended period, are complicated and require numerous timely interactions with different people gain maximum advantage. While in the opinion of sales reps, most CRM systems add administrative burden, ExSellece contains a robust set of functions that increase the productivity of the sales person while at the same time improving marketing and management's contributions. ExSellece assists in all phases of the sales process. First it insures the latest information regarding leads is in the hands of the right people at the right time. When it is time to identify needs and amplify benefits ExSellece ensures each person participating in the sales effort have the information needed to be effective. When it is time to bid, ExSellece assists in responding to RFPs. Functions such as Campaign Management, Contact Management, Workflow, Opportunity Management, Expense Reporting, Document Management and Business Analytics combine to bolster sales and marketing results. ExSellece's powerful combination of functions helps insure a sufficient number of opportunities are flowing into the sales funnel and the proper activities are taking place to meet revenue targets.

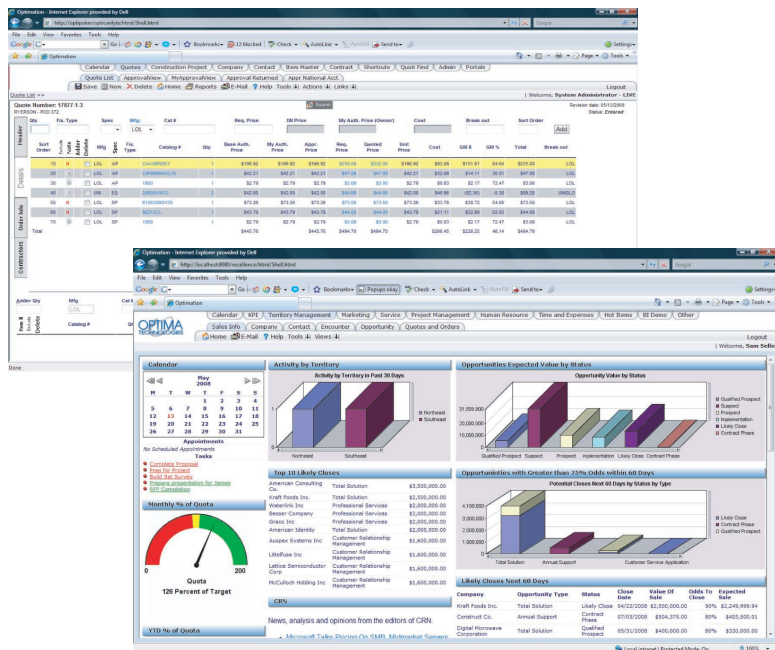


### Campaign, Contact and Opportunity Management Drive Business Results

ExSellece time management and workflow features increase productivity in the execution of marketing campaigns. The combined marketing and sales functions allow an organization to understand the results of campaigns and to adjust future strategies, capitalizing on this knowledge by repeating successful initiatives while discontinuing less effective activities.

ExSellece includes a fully functional electronic calendar that associates appointments and tasks with companies, contacts and opportunities, assuring that proper steps are followed in the sales process. It ensures reps gain unrivaled control of valuable selling time. Follow-up and commitments are no longer forgotten. Team selling is facilitated through the ability to selectively view all relevant information. It integrates with, but does not require, Microsoft Outlook to operate. Its group scheduling and abilities to handle recurring events, combined with its capability to notify when assignments have been made or tasks are slipping, ranks ExSellece among the best calendaring systems.

ExSellece sales automation is predicated on the premise that for a sales person to meet its sales objectives, its sales team must execute a disciplined sales process. ExSellece provides a proven sales process framework which can be easily adapted to incorporate the specific requirements of each company's own chosen sales methodology. All the capabilities come together to keep the sales person focusing on the right prospects and communicating at the appropriate time with all the "key players" including the influencers, financial buyers, coaches, and decision makers. Forecasting becomes the



# More Leads Identified, Opportunities Pursued, Sales Calls Made and Business Closed

by product of executing ones sales process and not a time consuming administrative headache. ExSelligence captures all interactions with companies and contacts. They then become part of the knowledge base available to assist in future sale efforts. Predefined alerts warn reps and managers of issues or situations that could produce unexpected, unpleasant surprises during client contacts. Consequently customer satisfaction and sales increase. E-mail integration, mail merge, and workflow combine to help the representative be proactive rather than reactive as they build relationships and close business. Opportunity scoring can be applied to help with prioritization of efforts and for improving strategies during execution of the sales process.

## Document Management, Expense and Time Reporting Tools Generate Savings

ExSelligence document management capabilities support a firm's efforts to reduce the costly flow and duplication of paper across the enterprise. Reports, forms, collateral, presentations, specifications, proposals, quotations and any other type of document can be stored, electronically reviewed and when necessary, printed. The information needed to improve a strategy or to close business is typically a "click" away.

The Expense Reporting component of ExSelligence provides anywhere, anytime capture of expenses for field personnel and the potential to accelerate payments to employees. It provides timely visibility of expenses across the organization. Expense data is easily associated with customers, vendors, or sales opportunities. Analytical functions assist in better control of expenses and justify discounts from frequently used vendors. The simpler expense reporting and reduced costs contributes to a more productive field force.

ExSelligence's optional time reporting component goes beyond the profile of activities supplied by most CRM systems. ExSelligence lets one understand how its sales and marketing team is spending its time. It provides a whole additional dimension of understanding. Bottlenecks are identified and eliminated, best practices strengthened and productivity improved.

## Business Analytics Increase Understanding and Foster Continuing Improvements

The ability to analyze all sales and client information collectively facilitates management's understanding of the sales and marketing team's operating performance, adherence to best practices and compliance enforcement. ExSelligence analytics, data monitoring and alerting, workflow agents and improvement initiative management features work in conjunction with data from all ExSelligence components, as well as data from other disparate systems a client utilizes. This availability of real time

data and automatic notifications improve service and make personnel proactive rather than reactive. Key performance indicators can be included for monitoring marketing, sales, service, and financial results. Multiple graphs, lists, velocity dials, tasks, appointments, and other pertinent information combine in personalized portal pages and dashboards to increase understanding and improve service and results.

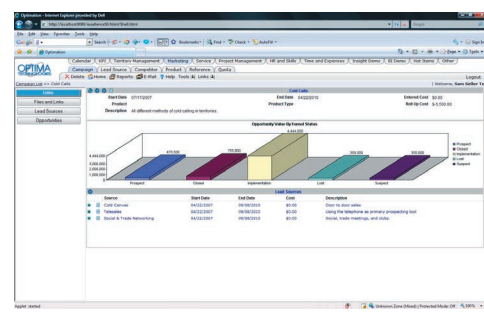
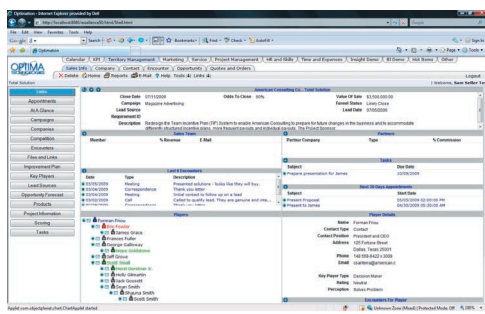
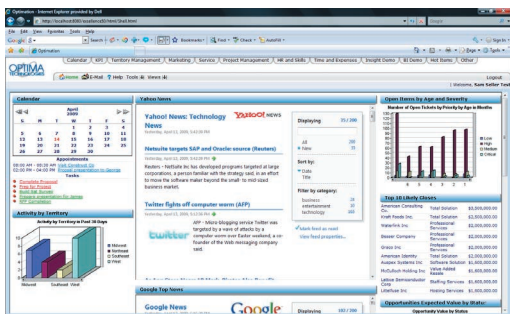
When opportunities for improvement arise, often initiatives are launched and people are assigned responsibilities in the quest of reaching goals and targets. Pressing day to day issues often cause employees to unknowingly defer tasks that make up key elements of such initiatives. Management follow up is difficult and frequently lacking and planned results become left to chance. ExSelligence addresses these issues. Tasks associated with improvement initiatives are assigned and automatic notification is delivered to appropriate personnel when the tasks are past due and completed. The initiative at a glance view gives team members a comprehensive view of the initiative. ExSelligence provides an added degree of control over the business and is a key contributing factor to its continuing improvement and success.

## Security and Workflow Agents Simplify the Adoption to New Processes

ExSelligence Security and Workflow Agents adapt "out of the box" capabilities to the specific demands of an individual company's current or evolving business processes. The underlying technology framework includes security, information flow, workflow and business process agents which, with training, can be applied by a company to modify security, create custom workflow to support improvements in the company's business processes, reduce administrative burden, and improve efficiencies. These features both extend benefits and longevity of the system while allowing the application and enforcement of best practices across the organization. Results are improved without sizeable increases in systems investment.

## Deploy Industry Leading System Capabilities Rapidly Without "Mega" Investment

The system deployment takes place in a timely fashion on a predetermined and agreed to fixed price. The system can be deployed on a customer's own IT infrastructure or Optima's server complex. The cost of an Optima solution is understood before deciding to proceed and typically is lower than competing alternatives. On time, on budget implementations are the norm for Optima clients. ExSelligence's combination of low cost and robust functionality, adapted to the specific processes of the client, are unique in the industry and insure high returns on systems investment.



Portals and dashboards are designed to include the different information required by different functional departments or individuals. They can be easily personalized to specific needs as the business evolves.

Opportunities are pursued using the companies own proven sales process. The "at a glance" capabilities allow a person to quickly understand the sales situation and to be able to effectively contribute towards winning business.

The Campaign Management capabilities highlight the expected and realized results of each initiative. Positive activities can be repeated while less effective campaigns can be eliminated.

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