

TSmall for Salesforce.com: Never Re-key Data Again

Benefits At-a-Glance

- **Provide visibility of all customer communications** to the entire account team
- **Minimize rekeying of information** and simplify the administration of Salesforce.com
- **Improve deal management by drilling into full details** organized by account and opportunity
- **Prepare more accurate proposals and contracts** with a complete accounting of both pre-deal and post-deal communications



The CRM Data Chase

CRM packages like Salesforce.com do a great job of organizing deal flow and guiding opportunities through a pipeline. The process, however, breaks down with more complex deals that demand coordinated efforts across different organizations and geographies. Documenting the opportunity and current status can take hours of Sales time per day and still customer communications are easily lost in long email threads and management is still frustrated with poor visibility to critical deal parameters.

In fact, a recent analyst study indicated that more than 90% of business collaboration happens in email - not in CRM.

To keep Sales selling and avoid endless copying and pasting of information, TSmall fully integrates team selling email communications with Salesforce.com.

Sales enjoys simplified administration with no double entry of data; for Management, improved control through perfect deal visibility.

TSmall for Salesforce.com

TSmall workspaces are now embedded within Salesforce.com Accounts and Opportunities. The workspace adds a whole new dimension to managing complex opportunities, making Salesforce.com the focal point for:

- Coordinating development of a proposal
- Implementing a strategic account plan
- Negotiating a contract
- Resolving a client's critical issue

The integration starts with the Inbox. When composing a new message it is classified (eg. an inquiry, proposal, negotiation) and linked by drop-down lists to current Salesforce.com accounts and opportunities. Using TSmall expertise management, a response team is defined and addressed. This effectively creates a workspace within Salesforce.com that references the team, the issue and all attached documents.

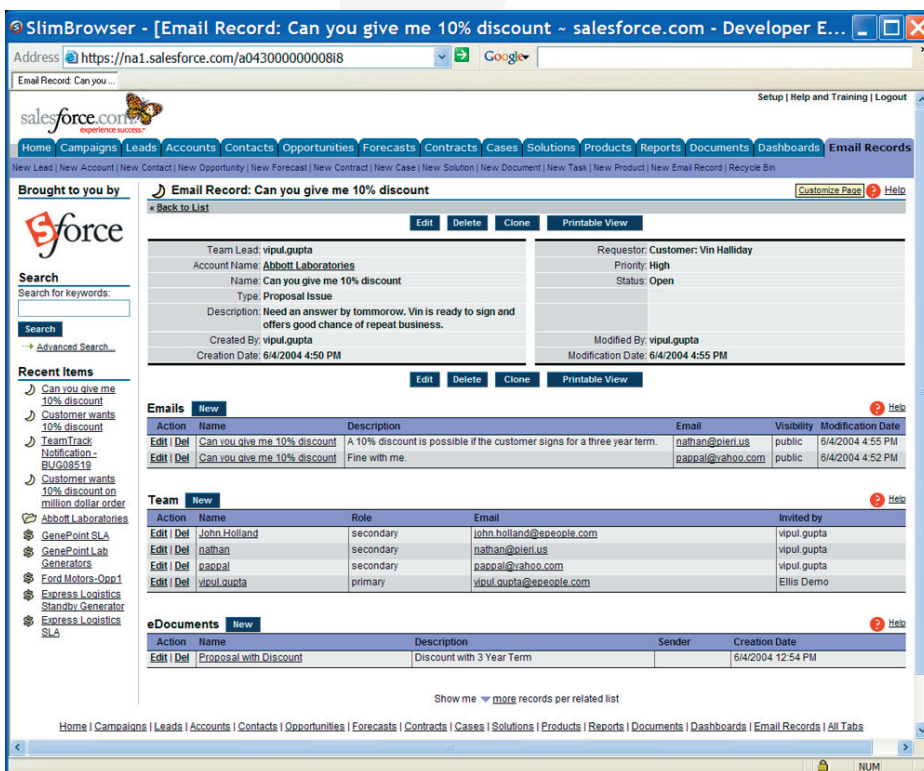
Then, as the issue is worked, the power of the TSmall integration with Salesforce.com kicks in. All replies to the initial message are cataloged. All subsequent documents are attached. And, all participants of the interaction are linked online. As new information is created it is updated - in real time - with no manual effort.

In Salesforce.com, summary workspaces organize each issue and link to the details, providing management with visibility to every email communication, reply and participant associated with the Opportunity. Often times, the key factor in large deals is how well the details are managed. With TSmall, you have the critical information you need, in one place, to bring complex deals over the line.

The TSmall certified integration is built with the Salesforce.com Sforce SDK and ePeople Web Services. Available out-of-the-box with an ePeople subscription, the bi-directional integration also supports single sign-on.

For more information on how TSmall can help close your complex deals, please contact us.

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The screenshot shows a Salesforce.com interface for an email record. The email title is "Can you give me 10% discount" and it is categorized as a "Proposal Issue". The description states: "Need an answer by tomorrow. Vin is ready to sign and offers good chance of repeat business." The email was created by vipul.gupta on 6/4/2004 at 4:50 PM. The interface also displays a list of team members and associated documents related to this email.

Action	Name	Description	Email	Visibility	Modification Date
Edit Del	Can you give me 10% discount	A 10% discount is possible if the customer signs for a three year term.	nathan@client.us	public	6/4/2004 4:55 PM
Edit Del	Can you give me 10% discount	Fine with me.	esapal@rahoo.com	public	6/4/2004 4:52 PM

Action	Name	Role	Email	Invited by
Edit Del	John Holland	secondary	john.holland@epeople.com	vipul.gupta
Edit Del	nathan	secondary	nathan@client.us	vipul.gupta
Edit Del	esapal	secondary	esapal@rahoo.com	vipul.gupta
Edit Del	vipul.gupta	primary	vipul.gupta@epeople.com	Ellis Demo

Action	Name	Description	Sender	Creation Date
Edit Del	Proposal with Discount	Discount with 3 Year Term		6/4/2004 12:54 PM