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PiSA sales Business Intelligence

Facts and figures for a straight route to success

With its user User and Company Cockpit, Drill-Down Center, Sales Funnel for forecasts, and Report Center, the PiSA sales CRM offers all users as well as business managers (from senior executives to the heads of marketing, sales, or service operations, and account managers) a comprehensive CRM-oriented data-warehousing solution.

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Keep track of all important data with Cockpits

The PiSA sales CRM provides every user with its own Cockpit or dashboard that pools key figures and analysis from the users' own areas of responsibility in a simple and clear manner. Needless to say, the so-phisticated access management of the solution is applied here as well. Besides the User Cockpit you can evaluate the performance of your customers and retailers with a special Company Cockpit. This direct view of key performance indicators of single compa-nies offers great opportunities e.g. in key account management. All Cockpit elements are individually configurable and fully controllable by parameters with a single click. You can use up to 36 Cockpit elements simultaneously.

- easy choice of different data sources
- choice of presentation form (tachometers, bar or pie diagrams, tables)
- central distribution of Cockpits by team leaders or administrators
- management of access to Cockpit elements and content data

PiSA sales Standard provides a large number of pre-configured Cockpit elements for immediate use. These elements may also, however, be customer-specifically adapted or augmented.

- *target-to-actual comparisons:* target figures as indicated in sales plans are set against the figures gleaned from the selling pipeline, e.g. the number of quotes issued or the number of orders received
- *Sales Funnel:* provides information about the number of transactions in each acquisition phase of the sales process and the revenue amounts
- *actual value:* e.g. the cumulative current value of all issued quotes or the actual number of meetings with customers
- *forecast analyses:* graphic presentation of the forecast volume of quotes, grouped according to the probability that they will result in an order
- *drill-down analyses:* summarizes data on multiple levels according to three dimensions (customer, process, product) and then presents the results in a facts table
- *watch lists:* process monitoring using dynamic filters, any desired figures can be cumulated, e.g. the current number of standing appointments within the framework of a telemarket-ing campaign
- *appointments:* overview of sales appointments or service calls (including optional map presentation in Google Maps, Bing or Here)
- ...

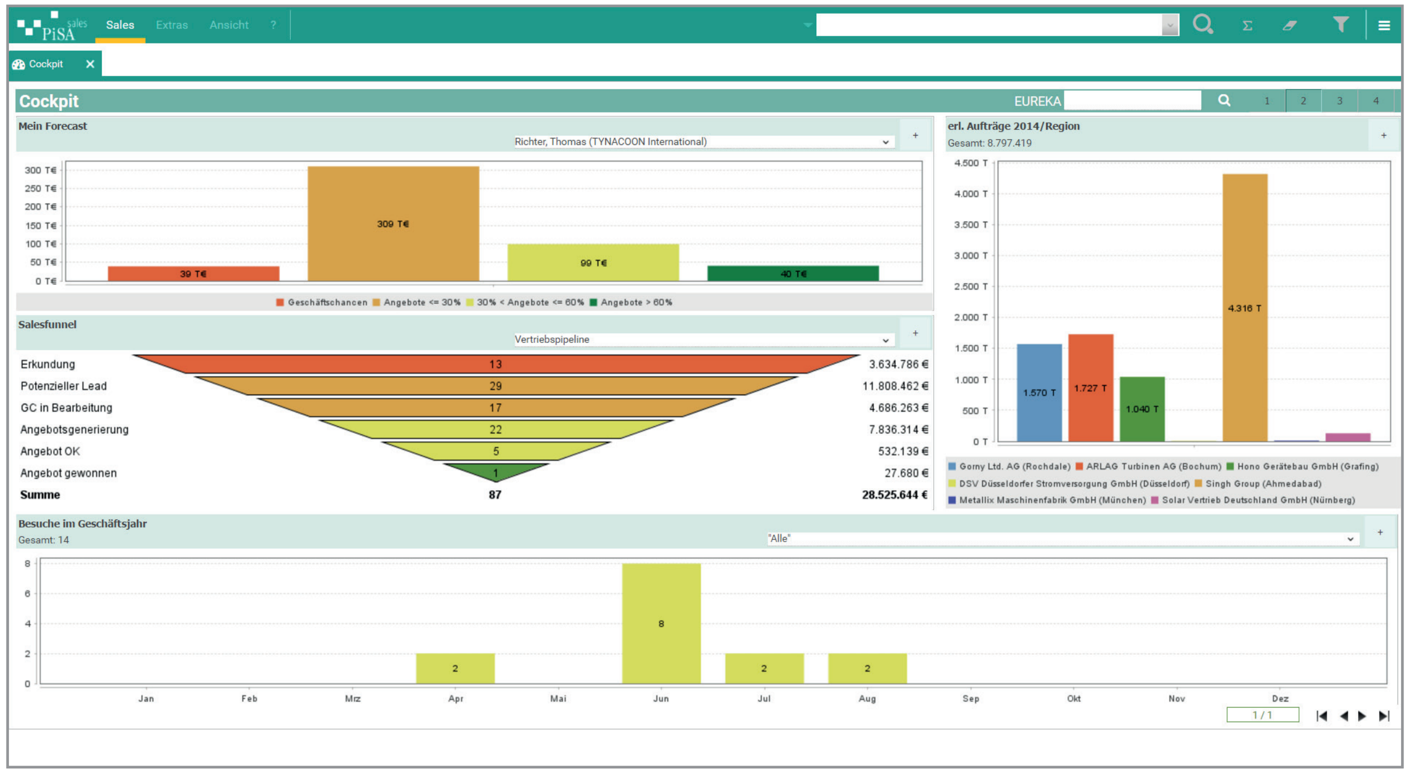
In all Cockpit elements, all data can be shown from which the displayed key figure is calculated (such as order overviews, list of unsolved service tickets, or campaigns with already exceeded budgets) can be accessed at the click of a button.

Drill-Down Center

The Drill-Down Center allows you to analyze and summarize data on multiple levels according to three dimensions process (oppor-tunity, quote, and order), customer as well as product / service. This enables analysis of the order value for products of a particular category and by customer, for example. Once created analysis may be saved and subsequently retrieved anew. The system will present analysis results in a comprehensive facts table covering all dimensions.

Selected results data can be presented in compact form in the Cockpit. All drill-down analyses are performed cyclically (e.g. several times per day), so that they always provide up-to-the-minute results.

- multi-dimensional searches across processes (business oppor-tunities, quotes, orders), customers, and products
- summarization across key fields relevant for analysis, e.g. process status, operator, customer group, customer sector, customer region, product group, or product line
- temporal summarization
- interactive structuring and presentation of search paths
- saving and retrieval of search paths
- display of quantity results in the facts table
- automatic cyclic update of facts table at variable intervals
- compact presentation of facts table in User Cockpit



Sales Funnel

To optimize your sales control (in sales and aftersales) the selling pipeline can be displayed in the form of a sales funnel showing weighted or unweighted sales revenues. An ideal-funnel model can be used as a basis to plan sales operations. With displaying the real funnel, you will be able to easily ascertain if your forecast is in a "healthy" state or if you need to invest in lead generation. Additionally, you can see which products and services are offered in a corresponding quote with a single click.

Report Center

The PiSA sales Report Center furnishes standardized reports, for example on:

- companies and individuals (e.g. ABC customer analyses, lead-lifecycle reports, etc.)
- sales processes (e.g. forecast reports, quotes/orders by status, sector, region, location, team, employee, etc.)
- competitors (e.g. quotes won/lost)
- activities (e.g. tasks, appointments by status)
- employees (e.g. list of companies worked through)
- service (e.g. service notifications, service-intensive products, etc.)

The following features are at your disposal in the Report Center:

- interactive parameterization (e.g. through selection of the timeframe, a product line, department, etc.)
- selectable types of diagram and output formats (depending on your reports)
- previews direct in the PiSA sales CRM or in linked applications
- saving to the PiSA sales document database, process or con-tact allocation, direct forwarding per e-mail
- batch reports (system performs background evaluations and provides a reports list)

Of course, you can create your own reports and edit already existing ones. We also offer a dedicated report training.

Overview lists for ad-hoc evaluations

Freely definable watch lists (dynamic filters) and overview lists for all business objects, such as contacts, activities, or sales, market-ing, and service processes, will enable you to monitor processes. With the help of user-definable filters such as “my processes” or “critical processes” you can extract data from those lists based on a variety of criteria. All the lists have convenient features (sorting by any desired criterion, e.g. get/go probability, weighted sales, or status; automatic sum display, e.g. to ascertain the cumulative order value for multiple quotes). The results can be exported to Excel at the click of a button or further processed as required.

We will be pleased to advise you!

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