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RESEARCH NOTE **A CLOSER LOOK AT INVISIBLECRM**

THE BOTTOM LINE

InvisibleCRM synchronizes Salesforce.com with Windows desktop applications to automatically update, store, and transfer customer information between the desktop and the CRM system. The result is increased user adoption of CRM, better ROI, and a happier sales force.

As we all know, the biggest challenge with CRM is actually getting users – who would rather keep their information on their desktop or in their e-mail – to use it. This creates huge problems: sales people have multiple versions of documents, they have to enter information in multiple places to be effective, and information cannot be easily shared or verified.

Although on-demand CRM was, in many cases, easier to use and adopt than traditional CRM, it didn't solve the user adoption challenge: people want to work with a familiar workspace.

InvisibleCRM enables users to communicate, track contacts, and manage sales in the Microsoft Outlook and the Microsoft Office My Documents folder while InvisibleCRM manages updates and alerts to the CRM system.

InvisibleCRM has three components that can be purchased together or separately and depending on the degree to which an organization's sales force relies on its Microsoft Office applications to manage its Salesforce.com account, users can benefit from the implementation of all or one of the InvisibleCRM components.

Using InvisibleCRM SalesDesktop, users can:

- View common Salesforce.com tabs such as accounts, contacts, leads, and opportunities as folders in the Microsoft Outlook file folder hierarchy, creating an organized platform for users to easily access, create, or modify documents.
- Send e-mails, update contacts and calendars, and add tasks in their Outlook environment while automatically sharing information between multiple contact lists and calendars so users only have to enter the information once. Users can also link tasks and appointments with CRM objects to create a detailed history of all customer activity.
- Automatically move selected or all Salesforce.com account, contact, lead, and opportunity information into Outlook.
- Set synchronization rules for immediate or timed updating to Outlook and Salesforce.com when files shared between both systems have been created or modified.

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- Automatically or manually attach all outbound e-mail correspondence with particular Salesforce.com information using a simple pull-down tool within Outlook that will keep one complete record of all sales activities. Doing this will provide managers and sales teams with up-to-date accounts of all customer discussions that will enable users to gain greater insight into their customers and strengthen overall relationships.
- Access recently updated information from the desktop so users can work offline or from remote locations when needed.

Using InvisibleCRM SalesFolder, users can:

- Create a folder within their Microsoft Office “My Documents” folder to store documents related to different CRM objects.
- Save new documents in the “My Documents” folder and then choose whether or not those documents should also be saved in Salesforce.com. If the document should be saved in Salesforce.com, InvisibleCRM’s relevancy search pull-down Window suggests the most appropriate locations (such as a specific account or prospect folder) for the document to be stored in Salesforce.com document archive.
- Use the “save as” functionality to save a document from any Microsoft Office program to a specified location within SalesFolder.
- Automatically deliver any new documents added to SalesFolder or Salesforce.com directly to the desktops of other sales team members.
- Set rules to synchronize documents between the specific “My Documents” folders and Salesforce.com folders on a regular basis.

Using SalesAlerts, users can:

- Receive pop-up messages delivered to their desktops notifying them of important information like closing dates, customer birthdays, and any changes made to the Salesforce.com accounts.
- React to alerts instantly by clicking the pop-up window.
- Access an automatically updated list of recently worked on projects that are sorted to specification and displayed on the desktop in a Windows Messenger layout.
- Set rules to check for Salesforce.com updates in order to be alerted to any changes or added contacts.

In addition to Salesforce.com, InvisibleCRM also provides Outlook integration for Amdocs and SmartFolder integration for Documentum. InvisibleCRM plans to have all three products, SalesDesktop, SalesFolder, and SalesAlerts, available soon for integration with SugarCRM and NetSuite.

With a low monthly fee and simple deployment, InvisibleCRM provides organizations with a cost-effective way to drive user adoption and improve the value of their Salesforce.com initiative.

BENEFITS OF INVISIBLECRM

Key benefits of deploying InvisibleCRM include:

- Improved customer relationships. The automatic updating and alerting of customer changes, modifications, and statistics provides salespeople with the immediate opportunities to attend to customer needs.
- Improved sales productivity. The automatic synchronization between e-mail applications and Salesforce.com eliminates time-consuming tasks such as lead searching, Salesforce.com updating, and personal documentation maintenance.
- Increased flexibility. Because InvisibleCRM puts customer information, documents, and communications on the desktop, users have the flexibility to work offline with accurate customer knowledge.
- Improved customer insight and accuracy. With the ability to increase the links between CRM objects, sales teams are now better equipped with accurate up-to-date knowledge of customers.

DOING THE MATH

List pricing for InvisibleCRM is on a per-user monthly basis: SaleDesktop is \$15, SalesFolder is \$10, and SalesAlerts is \$7. For organizations that purchase both SaleDesktop and SalesFolder, SalesAlerts is included for free.

A salesperson with a fully loaded annual cost of \$80,000 per year would pay back a SaleDesktop investment after just the first five hours of time saved.

CONCLUSION

InvisibleCRM helps organizations drive CRM adoption by integrating CRM with the desktop and allowing users to work in a familiar environment. InvisibleCRM provides enterprises with low CRM adoption rates an opportunity to drive greater ROI by creating an environment that is home to accurate information that is easy to find and navigate. With InvisibleCRM users are likely to increase their productivity, increase the amount of contact and lead information that is tracked in the CRM system, and drive greater profitability for their organizations.

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