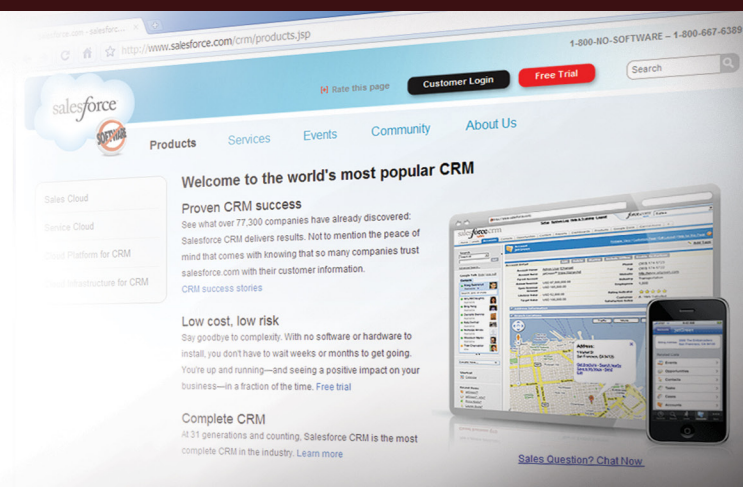


# Salesforce.com Integration

*The intersection between “time is money” and “knowledge is power”*



Salespeople have a wealth of tools at their disposal, from CRM software to lead generation tools to ROI calculators and pricing spreadsheets. However, most sales personnel do not (or will not) use all the tools available to them—mainly because learning, installing, and accessing them takes away too much valuable time from their primary objective: reaching out to current/potential clients and selling.

Primary Intelligence understands this. We know that your sales team’s time is a precious commodity, so we have integrated our Horizon win loss analysis technology into the framework of salesforce.com’s award-winning SFA tool. In other words, your sales personnel (who are already using salesforce.com) can access Primary Intelligence’s competitive analysis tools quickly and easily from their SFA tool, giving them the information they need when they need it, without unnecessary delays or interruptions.

Using Primary Intelligence’s salesforce.com integration, your sales teams will have access to:

**Intelligence on competing vendors, selected by the sales representative, for the opportunities they are working on:**

- The strengths and weaknesses of potential competitors’ sales strategies
- The primary reasons why decision makers selected your competitor in past opportunities
- The primary reasons why decision makers selected you over specific competitors in past opportunities

**▼ DiaZed Technologies**

**Strengths & Threats**

- ▼ Selection Reasons  
DiaZed Technologies introduced some new advances in their product platform that seemed to be a perfect solution to our problem.  
**Chief Technology Officer for Nologies Incorporate evaluating \$640K solution on 3/2007**
- ▼ Sales Team Strengths
- ▼ Product Strengths

**Pricing intelligence and cost analysis on competitors, selected by the sales representative, for the opportunities they are working on:**

- The competitor’s pricing strategy, showing how often the competitor’s pricing has been higher, lower, or similarly priced, and how much higher or lower their pricing is on average
- Key pricing alerts to notify the sales representative about potential pricing risks and/or opportunities versus the selected competitor
- Areas where the competitor is vulnerable to cost and value comparisons

**▼ Pricing Research**

**▼ DDX**

Pricing	Probability	Amount	Win Rate	Avg. Deal Size
Similar	11%	-	0%	\$230K
Higher	89%	28%	25%	\$404K
Lower	0%	0%	0%	\$0K

### **Sales resource intelligence specific to the opportunities the sales representative is working on:**

- The best potential customer references for the sales rep to utilize
- Sales peers with strong track records in similar opportunities or strong track records versus the selected competition
- Potential “anti-references” for the selected competitors (anti-references are decision makers that selected the competition, but have expressed dissatisfaction with their decision)

### **Intelligence on similar opportunities specific to the deal the sales representative is working on:**

- Win Loss profiles of related or similar sales opportunities
- Analysis of what strategies have (and haven't) worked in the past
- Advice from similar prospects on how their needs can be met
- Industry-specific “hot buttons” to be aware of during the process

### **Security Information**

- Primary Intelligence does not need direct access to your Salesforce.com account.
- The following visual elements are created in your instance of Salesforce:
  - *Win Loss Settings* – this is a new tab that is created. Access to this can be controlled by you.
  - *Page layout elements* – “Submit for Review” button, “Competitive Intelligence” button and “Competitor List” related list.
  - *Visual Force page* – the competitive intelligence page is a popup that is opened when a user clicks the “Competitor List” button.
- The following data is stored with your instance of Salesforce:
  - *License key* – this is entered in the Win Loss Settings tab and used when retrieving data from Primary Intelligence's side or submitting an opportunity for review.
  - *Service URL* – this is entered in the Win Loss Settings tab and used when retrieving data from our side or submitting an opportunity for review.
  - *Competitor list* – this is created and updated when a users clicks the “Import Competitors” button in the Win Loss Settings tab (Primary Intelligence only stores an ID and name for the competitor).
  - *Opportunity competitors* – Primary Intelligence stores a list of selected competitors added to the “Competitor List” related list (Primary Intelligence only stores an ID and name for the competitor).