

IBM Software Demos
Lotus Sales Management – Sales Rep Scenario

<0:00>

In today's competitive environment, companies are driven to increase revenues, while at the same time striving to improve sales productivity and maintain a high level of insight. IBM Lotus Sales Management software is a customizable IBM WebSphere Portal-based solution, designed to help increase sales productivity by improving communication and streamlining opportunity management activities.

<0:25>

Tom Baker, a product sales specialist at an IBM software reseller, logs in to the Lotus Sales Management solution. His company has provided their sales force and sales management teams with this portal-based opportunity management solution which allows them to spend more time in front of customers, and less time in front of the computer entering and retrieving data.

<0:48>

As Tom logs in to prepare for an upcoming sales call on one of his pipeline accounts, WebSphere Portal server determines his role, permissions, available information, and user preferences.

<1:01>

Tom's personalized home page provides him with:

- Status on his sales goals and objectives,
- Status on his submitted expense reports,
- A Sales calendar,
- Sales announcements,
- Educational offerings,
- and a news feed

<1:21>

On the 'Opportunity Info' page, Tom opens one of his key customers, Fire Computers.

<1:32>

Here he sees the details of the opportunity, and causes the associated 'Sales Tracking', 'Inventory Watch', and 'Customer Detail' portlet to dynamically update. Although the information in each of these portlets is being pulled from different data sources, it is displayed seamlessly to Tom.

<1:52>

A proof-of-concept has recently been completed at Fire Computers, and Tom needs to update the Siebel tracking system with the results. He easily edits the tracking information for the deal, and updates the dollar amount of the opportunity.

IBM Software Demos
Lotus Sales Management – Sales Rep Scenario

<2:07>

Once the updates are submitted, the Lotus Sales Management solution writes the changes back to the Siebel system. The assembly of data and processes from multiple, disparate systems can help companies increase the return on existing software investments.

<2:24>

After the page is refreshed, Tom's update is reflected in the 'Opportunities' portlet.

<2:31>

At this point, Tom begins to prepare for his upcoming sales call with Fire Computers.

<2:37>

First, he reviews the products that the customer has purchased in the past, allowing him to better serve them today and in the future. These personalized, user friendly interfaces adapt their structure, presentation, flow, and access rights based on the role of the user, helping Tom and his peers to be more productive.

<2:59>

Now that he has a better understanding of his customer's past purchases and current situation, Tom moves to the 'Supporting Info' page to look at customer satisfaction data, and review suggested additional products to offer his customer during his next visit.

<3:15>

Finally, and perhaps most importantly, he checks to see if there are any outstanding customer support issues to be addressed.

<3:24>

Armed with all of this information, Tom is ready for his visit. He verifies the customer location using the mapping solution implemented at his company.

<3:35>

With his account planning work done, Tom switches to a page where he can review his employee finances at the company. Here he checks to see if his recently submitted expense report has cleared. He also has the option to launch the expense application used to generate the reports.

<3:54>

IBM Software Demos
Lotus Sales Management – Sales Rep Scenario

Next, Tom reviews his compensation data.

<3:58>

He realizes that if the Fire Computers deal closes, he will qualify for a higher commission rate. In the 'Compensation' portlet, he can see what impact a higher rate will have on his overall commission.

<4:10>

Editing the Opportunity entry for the Fire Computers deal, he increases the commission rate from 12 to 14 percent. After clicking OK, the compensation values are updated dynamically, displaying encouraging results.

<4:26>

Tom is now well prepared to attend his client meeting, and well incented to close the deal.

<4:33>

Using IBM Lotus Sales Management software, Tom was able to quickly and easily review and update critical opportunity information to stay competitive. He also saved valuable time by having his personalized information presented to him the way he wanted to see it, thereby improving efficiency.

<END>