

RELATIONSHIP ANALYTICS FOR SALESFORCE.COM

Relationship intelligence for smarter Salesforce.com

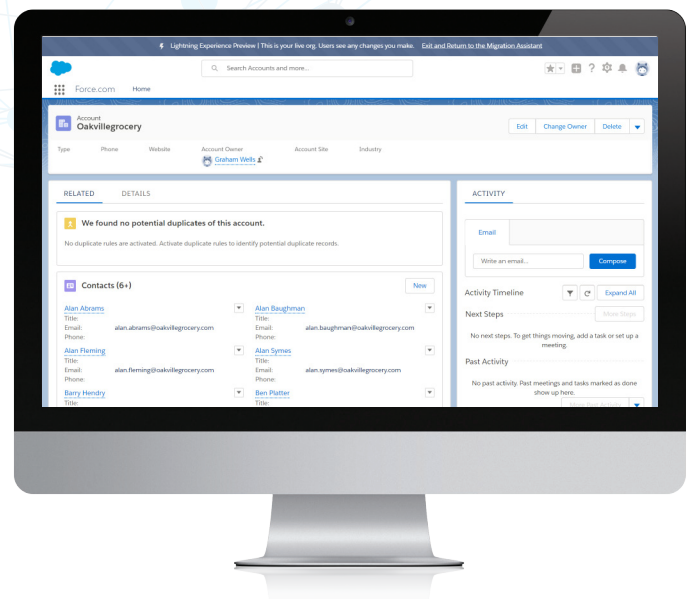
Customers' expectations are rapidly evolving. They now expect deeper, personalized and more connected experiences. A businesses' success is increasingly dependent on rapidly building these deeper, more connected relationships and demonstrating that they understand their customers in a way that differentiates them. Investing in a customer relationship management (CRM) solution is now hygiene and not a significant differentiator. Businesses need to ensure the data they capture is current, relevant and insightful and that it enables their teams to actively demonstrate their appreciation of their customer's business.

In short, businesses need unique, actionable insights into their customer relationships.

Getting the most from the investment in CRM is dependent on staff engagement with the platform and that in turn is driven by the relevance of customer relationship data. With typically, less than 10% of all customer interactions entered into CRM, relying on teams to do this manually is a high-risk strategy that distracts them from spending valuable time with customers and is almost certain to fail.

TrustSphere's unique relationship analytics platform analyzes digital communications to identify critical relationship insights that otherwise lie dormant in an organization's communication and collaboration systems. It is a pivotal source of insight that can give CRM systems a new boost for maximizing sales productivity, effectiveness and customer engagement.

By leveraging the collective relationship network of an organization, Relationship Analytics for Salesforce.com provides previously unavailable insights on customer relationships exactly when you need them. By analyzing where your team and your customers interact, in corporate email, IM and telephone systems, TrustSphere's unique Relationship Analytics platform surfaces hidden relationship networks between employees and customers, based on Organizational Network Analytics ("ONA").



*Stay current with your customers and automatically identify up to
200% more Relationships.*

Unique algorithms that quantify and differentiate “mere connections” from “actual relationships” provide timely and actionable insights that help Salesforce.com users to drive better customer experience and sales outcomes.

TrustSphere’s globally unique analytics solution automatically integrates these insights into your Salesforce interface to ensure customer relationship data is always relevant, is seamlessly maintained and your sales teams spend less time updating Salesforce and more time serving and prospecting for customers.

ENHANCED FUNCTIONALITY TO HELP YOU GET MORE OUT OF YOUR SALESFORCE INVESTMENT

TransitionReport

Transition report for dana.puthigai@company.com

Export

Date range: 03-Aug-2017 14:28 to 03-Nov-2017 14:28

375 relationships, 88 of which are strong

230 active relationships, 58 at risk

67 new relationships in last 30 days

Contact Domain	Contact Address	Type	Trustscore	Latest Contact	Latest In	Latest Out	Received	Sent
				greater than			greater than	greater than
cinergy.com	molly.grigsby@cinergy.com	✉		8 days	Oct 04, 2017	Oct 26, 2017	26	38
redsky.com	jonathan.parks@redsky.com	✉		3 days	Oct 31, 2017	Oct 26, 2017	435	22
umich.edu	savita.leppard@umich.edu	✉		1 day	Nov 02, 2017	Nov 02, 2017	34	846
weil.com	shirley.watson@weil.com	✉		today	Nov 02, 2017	Nov 02, 2017	252	190
vhlp.com	mike.kean@vhlp.com	✉		80 days	Aug 15, 2017	Aug 15, 2017	26	39
cinergy.com	fiona.scott@cinergy.com	✉		55 days	Sep 09, 2017	Sep 09, 2017	1,927	965
client.com	fiona.scott@client.com	✉		55 days	Sep 09, 2017	Sep 09, 2017	1,913	956
cinergy.com	leslie.greenberg@cinergy.com	✉		37 days	Sep 27, 2017	Sep 27, 2017	6	7
intergen.com	ray.reitmeyer@intergen.com	✉		4 days	Oct 30, 2017	Oct 25, 2017	138	67

Total Items: 375

Reduce the cost of staff turnover

A typical sales organization loses between 15 - 20% of its team every year.

Staff turnover causes disruption to customers, impacts client retention and drives unproductive costs as new staff come up to speed. Providing insights into customer relationships from across the organization to a new sales executive accelerates the on-boarding process and helps staff engage and contribute faster to your business.

Customers tell us the Transition Report accelerates time to proficiency by up to 70% - a real bottom line improvement for your business. Relationship strength, volume and recency of communication help new employees engage with key customers and prospects in a structured, contextualized way.

Improve sales productivity and sales efficiency

TrustSphere Missing Contacts Dashlet reveals what is NOT in Salesforce.com - all the contacts and important relationships that do actually exist, but have not been manually entered into the CRM - and prompts customer facing stakeholders to add these potential contacts with just one click. Saving valuable time that can be better spent in the field engaging with the customers.

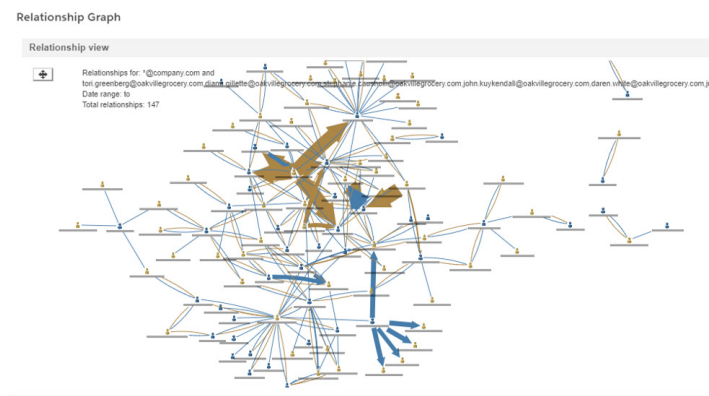
Missing Contacts			
With: oakvillegrocery.com		Find	
From: 10/1/2017 3:49 AM			
Action	Person	Last Contact	TrustScore
Contact Lead	richard.scott@oakvillegrocery.com	10/8/2017 7:08 PM	Low
Contact Lead	fin.comnes@oakvillegrocery.com	10/25/2017 8:11 AM	Medium
Contact Lead	lexi.williams@oakvillegrocery.com	10/27/2017 2:09 AM	Low
Contact Lead	judy.watson@oakvillegrocery.com	10/29/2017 11:15 PM	Low
Contact Lead	john.blair@oakvillegrocery.com	10/31/2017 2:32 AM	Low

Automatically create a real 360° degree view of customers

Our customers appreciate the benefits of having relevant relationship data available when they need it. Armed with a 360 degree view, sales teams are able to present a connected customer experience that is otherwise missing and damaging the business. When was your customer last contacted and by whom? What was the context of this interaction? TrustSphere automatically answers these simple, yet important questions to create the customer-centric view you need.

View the last time someone emailed your prospect, customer or partner and connect sales, service and back office teams in an intelligent way. TrustSphere provides sales manager's visibility of all interactions with clients, including staff not in the CRM, so that they are always prepared with coordinated customer dialogue in meetings and calls.

Customer Interaction 360		
Contact: Account contacts (65) With: All persons at company.com From: 10/21/2017 3:02 AM		
Retrieve		
Date	From	To
10/25/2017 1:31 AM	rosalee.hyvl@company.com	alan.abrams@oakvillegrocery.com
10/23/2017 11:29 PM	alan.abrams@oakvillegrocery.com	rosalee.hyvl@company.com
10/31/2017 12:10 AM	barry.hendry@oakvillegrocery.com	alan.goodell@company.com
10/31/2017 12:10 AM	barry.hendry@oakvillegrocery.com	elizabeth.griffith@company.com
10/31/2017 12:10 AM	barry.hendry@oakvillegrocery.com	danny.martin@company.com



Identify accounts at-risk with powerful visualization

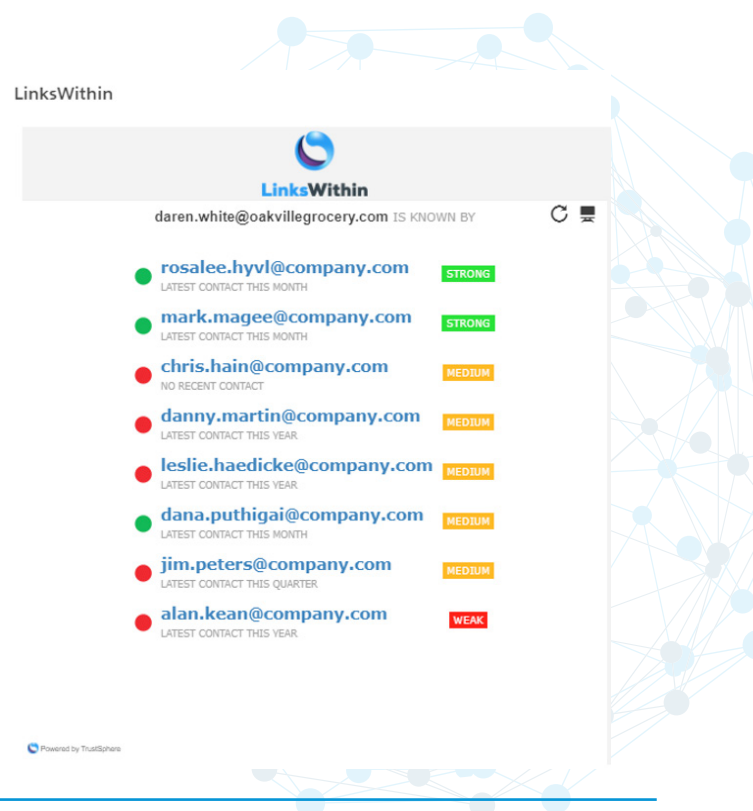
Available at the click of a button, TrustSphere's Relationship Graph is an easy to understand visual representation of all relationships (and their strength) between the organization and its' customer. Sales leaders and team use this impressive feature to quickly identify relationships or accounts at risk, under representation in key accounts and risks to closing opportunities because of inadequate relationships or over investment in relationships with the wrong stakeholders.

Successful prospecting by replacing cold calls with warm introductions

Warm introductions are 5x more likely to be successful than cold calls. TrustSphere's LinksWithin can accurately identify people within your organization who have built a strong relationship with an external party.

With LinksWithin, cold calling becomes a thing of the past as teams are enabled to work together in a more coordinated and effective way to capitalize on company-wide relationships.

Whilst social networking sites are great at telling you who might be "connected", they are less effective at telling you who has an actual "relationship". LinksWithin replaces the 'chance' of stumbling upon the right person in your organization who can make an introduction, with a relevant, actionable insight at the click of a button.



REPORT Opportunity action report											
Total Records 11											
ACCOUNT NAME: ACCOUNT NAME ↑	OPPORTUNITY NAME ↑	AMOUNT ↑	ROLE	FULL NAME	TRUSTSCORE	STATUS	CLOSE DATE	LAST CONTACTED BY	LAST COMMUNICATION DATE	LAST INBOUND	LAST OUTBOUND
Digitalfirst (11 records)	Digital First (11 records)	575,000.00 (11 records)	Decision Maker	Greg Alvarez	28.0	🟡	11/14/2017	daren.lucci@company.com	12/5/2017 8:47 AM	11/29/2017 12:28 PM	12/5/2017 8:47 AM
			Decision Maker	Robin Bass	24.0	🟡	11/14/2017	daren.lucci@company.com	12/5/2017 8:47 AM	11/29/2017 12:28 PM	12/5/2017 8:47 AM
			Business User	Sheila Shively	39.0	🟡	11/14/2017	daren.lucci@company.com	12/5/2017 8:47 AM	11/29/2017 12:28 PM	12/5/2017 8:47 AM
			Business	Sheila	30.0	🟡	11/14/2017	daren.lucci@company.com	12/5/2017 8:47 AM	11/29/2017 12:28 PM	12/5/2017 8:47 AM

Quickly & easily convert opportunities into deals

We understand how busy sales leaders and teams are. Insights into your opportunity pipeline give an understanding of how likely your opportunities are to close based on relationships with key decision makers and influencers. TrustSphere Opportunity Action Report identifies the status of the crucial relationships and prompts an action to maintain them.

The Opportunity Action Report simplifies the weekly sales call by highlighting the key opportunities at risk due to ineffective or poor relationships with key customer staff and enables a richer, more effective action planning conversation that helps close the deal.

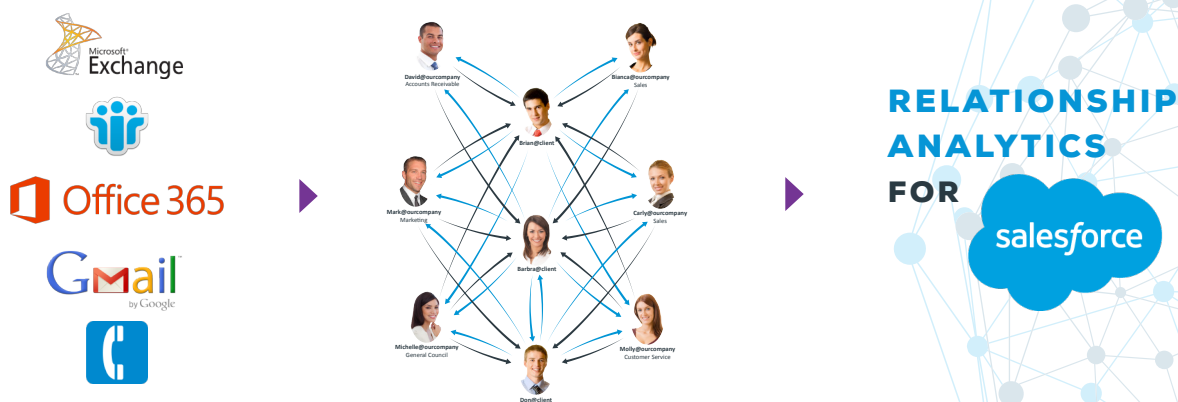
How it works

TrustSphere extracts a minimal set of meta data from corporate email, instant messaging and telephony systems which is then ingested and analyzed by TrustSphere's proprietary Relationship Analytics Platform TrustVault. TrustVault generates actionable insights by maintaining an organization's Relationship Graph of relationships between employees and customers.

These relationships are quantified using proprietary algorithms to provide metrics which highlight to users which ones to leverage on.

The relationship metrics are assigned to leads and contacts in the CRM. Allowing them to be accessed easily and in real time, by anyone in the organization enables context-based decisions to be made.

The meta-data connections and TrustVault instance must be set up for your organization before installing and using the Relationship Analytics for Salesforce product within Salesforce. Both 'Cloud' and 'On-premises' installations are supported. An illustration of the setup and flow of data is shown below.



Privacy Statement: TrustSphere is committed to maintaining the confidentiality, integrity, and security of personal information in our care and entrusted to us. We understand the operative privacy legislation and practices across jurisdictions and comply with both our legal obligations and our customers' expectations.

For more information, please visit <https://www.trustsphere.com/privacy/>

Contact your Salesforce representative or Partner to get started!