

Roadmap Software

Reinforcing your sales methodology through state-of-the-art technology

Overview

Roadmap Software is a cloud-based SaaS product suite which reinforces Infoteam's Winning Complex Sales™ (WCS), Managing Strategic Accounts™ (MSA) and Initiating New Business™ (INB) sales methodologies in daily business. It comes in two versions – Roadmap CRM and Roadmap On-Line. Roadmap CRM combines all the familiar elements of the Opportunity Roadmap, Account Roadmap, and Appointment One-Pager with easy access to CRM contact information. Bi-directional data interchange eliminates double data entry, and provides synchronisation of action plan tasks. Roadmap CRM is available today with connectors for Oracle on Demand, salesforce.com and Microsoft Dynamics. A connector for SAP will be available in 2015. Roadmap On-Line provides the same functionality without CRM integration.

User Functionality

Users access the Opportunity, Account Roadmap or Appointment One-Pager by simply clicking on a link. This launches the application containing all the familiar workshop concepts such as Project Qualification, Buying Center Analysis, Individual Value Propositions, Deal One-Pager, Competitive Strategy, Mutual Action Plan, Account Development Plan and Appointment One-Pager. Customisable coaching tips are available throughout the application, and your Ideal Sales Process and Account Management Best Practices suggest tasks to include in the action plan.

In Roadmap CRM contact names within the customer company, as well as those of other opportunity team members, can be accessed directly from within the application. The integrity of forecast-related data such as sales volume, probability of winning and closing date are fully protected.

Actions are transferred automatically to the CRM system when the opportunity is saved. Other CRM users with appropriate access rights can also view the Opportunity and Account Roadmap analysis information, and printouts can be shared with non-system users.

Administrator Functionality

The system administrator has access to additional functionality, to customise the application. The Ideal Sales Process, Project Qualification Profile, Mutual Action Plan and Appointment Planning Repository are among the areas that can be fully customised to your business. In addition, the field labels, coaching questions, and language options can be modified centrally, and deployed to all Roadmap software users.

In Roadmap CRM the administrator can also configure the specific fields that are transferred between Account and Opportunity Roadmap and the back-end CRM system.

The initial installation includes all customisable data in English, German, French, Spanish, Italian, Dutch, and Russian. New languages can be added quickly using the simple translation tools.

Benefits

- **High adoption of sales methodology** – resulting in better call planning, thorough opportunity qualification and a higher win rate
- **Higher adoption of CRM** – the integration of a powerful opportunity and account planning tool adds value to CRM users
- **Improved team selling** – through easy access to opportunity and account information
- **Effective reviews** – managers use the Opportunity and Account Roadmap for coaching critical deals and account planning sessions
- **Zero IT-impact installation** – requires *no* change to existing CRM

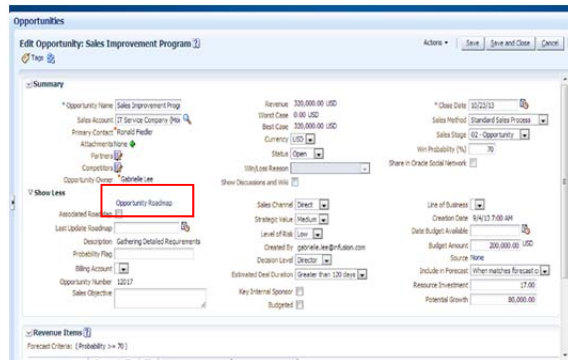
Development and Support

Roadmap software is a web-hosted application developed and supported by White Springs Ltd., in cooperation with Infoteam. White Springs is specialised in the integration of world-class sales methodologies into on-demand, and on-premise CRM systems. They provide installation, configuration and CRM administrator support, and ensure continued compatibility with future versions.

Roadmap Software in Detail

The interface to Roadmap CRM is fully integrated into the back-end CRM software, and accessed directly from within the opportunity and account records. This ensures complete data integrity and reduces double data entry and minimises the effort required to use Roadmap CRM in your sales team's working environment.

Here below, is an example of how the end-user accesses the application by simply clicking on a link in the opportunity, account or task record.

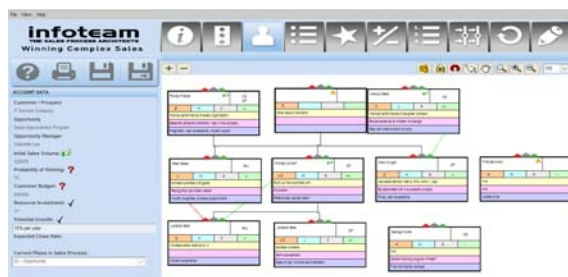


The application draws all opportunity information from the CRM system in the background and presents the familiar Winning Complex Sales™, Managing Strategic Accounts™ and Initiating New Business™ concepts in the individual screens.

The Opportunity Description section, seen here below, is where the user enters general information about the sales opportunity such as customer's objectives, sales objectives and solution offering, as well as opportunity team members, budget and expected closing date.



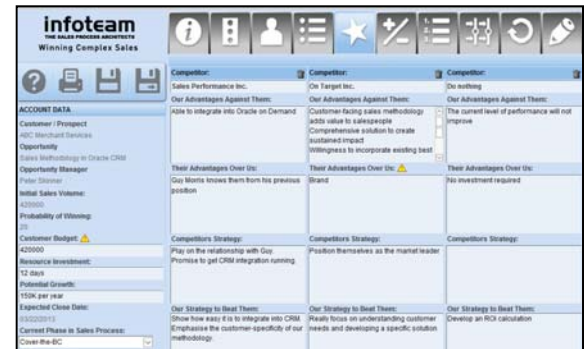
The most significant way in which the application enhances the user experience is with the graphical representation of the customer's Buying Center.



Roadmap software makes it easy to map Buying Center members by drawing on the existing database of contacts in the customer organisation from

the back-end CRM application, and simply adding them to the Buying Center.

The Competitive Strategy screen, shown below, illustrates your strengths and weaknesses, and helps develop a winning strategy.

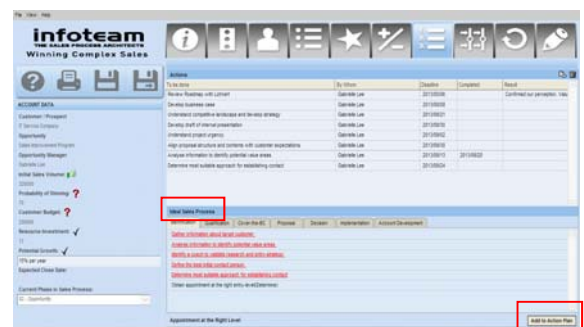


Flags such as the «traffic triangle», which are available throughout the application, can be used to highlight specific problems, while the «thumbs up» seen on other screens can be used to mark strengths.

The Deal One-Pager, which consolidates Individual Value Propositions into a Management Summary, and the Mutual Action Plan, can easily be exported into Powerpoint – see highlighted square below.



The Action Plan screen integrates your company's sales process – and allows actions to be added with a simple click. Saving the opportunity automatically synchronises the actions with the back-end CRM.



Roadmap On-Line provides the same functionality as Roadmap CRM without requiring a front-end CRM system. The application is accessed via a register of account, opportunity and appointment names.

We look forward to demonstrating how Roadmap Software will maximise the return-on-invest of your sales transformation project.