



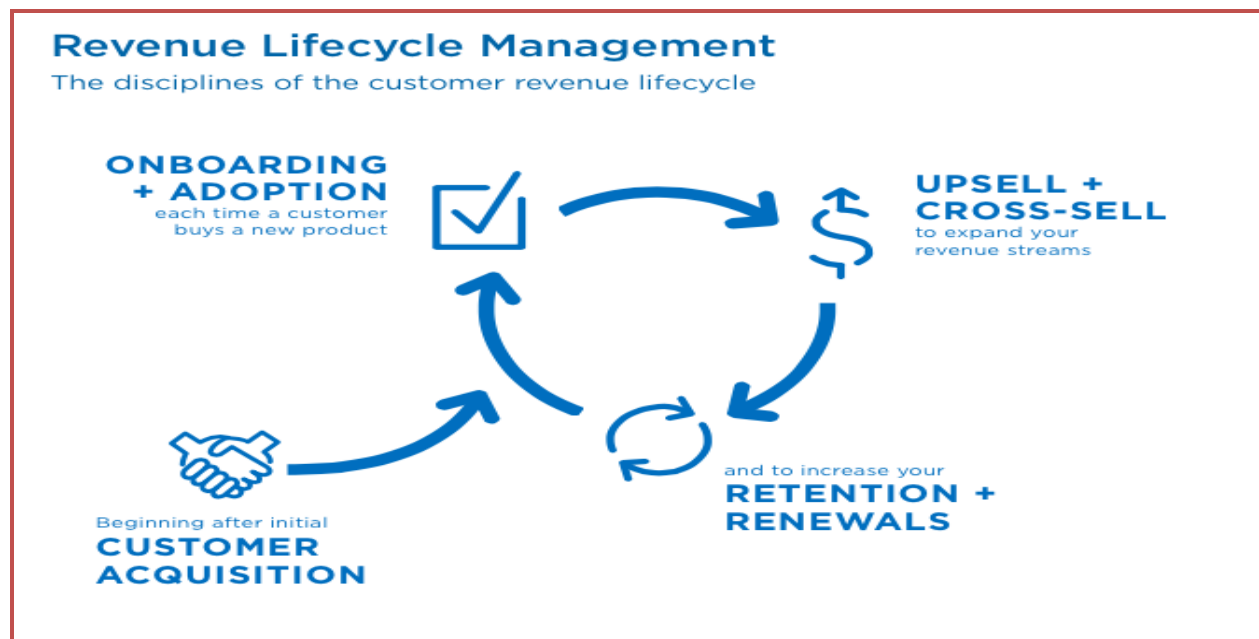
ServiceSource with PositiveEdge Solutions on Salesforce CRM



PositiveEdge Solutions supports ServiceSource in leveraging features of one of the fastest growing technologies in the world – The Salesforce. The CRM software of Salesforce is the best choice for sales agents, managers and the executives. In order to enhance and accomplish ServiceSource's entire revenue lifecycle and their upcoming business undertakings, PositiveEdge Solutions has carefully chosen specialized and highly trained personnel to achieve this divergent requirement.

COMPANY INTRODUCTION:

ServiceSource is a consultant of service renewals for various products ranging from world's leading IT to varied Electronic Companies. The primary focus of ServiceSource is to identify the end users of its customer who are using their products and maintain their service renewal process. ServiceSource's solutions help companies with onboarding and adoption, upsell and cross-sell, retention and renewals—the entire revenue lifecycle. Only ServiceSource brings to market more than 15 years of exclusive focus on customer success and revenue growth. With global deployments across 40 languages and 150 countries, and a powerful, purpose-built recurring revenue technology platform, ServiceSource has billions of dollars in recurring revenue under management. Thanks to ServiceSource, another customer is renewed every 47 seconds.



BUSINESS CHALLENGES

Potential businesses confront varied opportunities that demand different solutions. Recognizing and acknowledging them with the best approach becomes important for a continued growth.

Some of the key Salesforce business needs of ServiceSource that were addressed by PositiveEdge Solutions are:

- Ability to track the Sales process.
 - PositiveEdge Solutions has implemented a methodology that tracks step-by-step progress of a Sale with respect to reaching the prospects, qualifying the leads and closing the deals.
- A feature for the partner users to track the status of opportunities.
 - On Salesforce solution, in order to track the status of an opportunity by the partner users, PositiveEdge Solutions has implemented an ability of tracking history for standard and custom opportunity fields.
- Simplifying the existing process of opportunity and opportunity product creation.
 - Creating and managing all of sales opportunities along with their product details can be complex and time consuming, especially for a company that offers a range of products and services. With this challenge on mind, PositiveEdge Solutions has customized Salesforce that helps the sales representatives to easily identify an appropriate product offering and its prospects.
- Inability to Split and consolidate opportunities.
 - Enabling a feature of 'Opportunity Splits' within Salesforce; supports the requirement of splitting the opportunity records. PositiveEdge Solutions has achieved this functionality controlling its impact at various places within Salesforce.
- Simplifying the existing process of quote creation.
 - PositiveEdge has executed an exquisite feature of streamlining the existing process of creating Quotes using related and simplified Products list.
- Manual workflows across multiple departments
 - PositiveEdge has more efficiently establishes the process of operating workflows manually; across different departments. This functionality standardizes internal procedures and business processes.

- Implementation of automated notifications, follow-ups, alerts.
 - Automatic email notifications are configured for follow-ups and to notify the sales team members on addition of a new opportunity to an Account or on a case being closed and on certain other required alerts.
- Loss of revenue generated opportunities.

THE SOLUTION

PositiveEdge has implemented Salesforce for ServiceSource to address their business needs with a good deal of customizations; integrating charts and dashboards. PES has provided comprehensive solution for opportunity management and channel portal. The business objective of implementing opportunity management is to generate new opportunities and to renew their existing opportunities.



Fig1: Sales process

The partner users look at the opportunities through channel portal (community). Waterfall Charts are used to display “Renewal Insights” and has the capacity to drill-down reports.

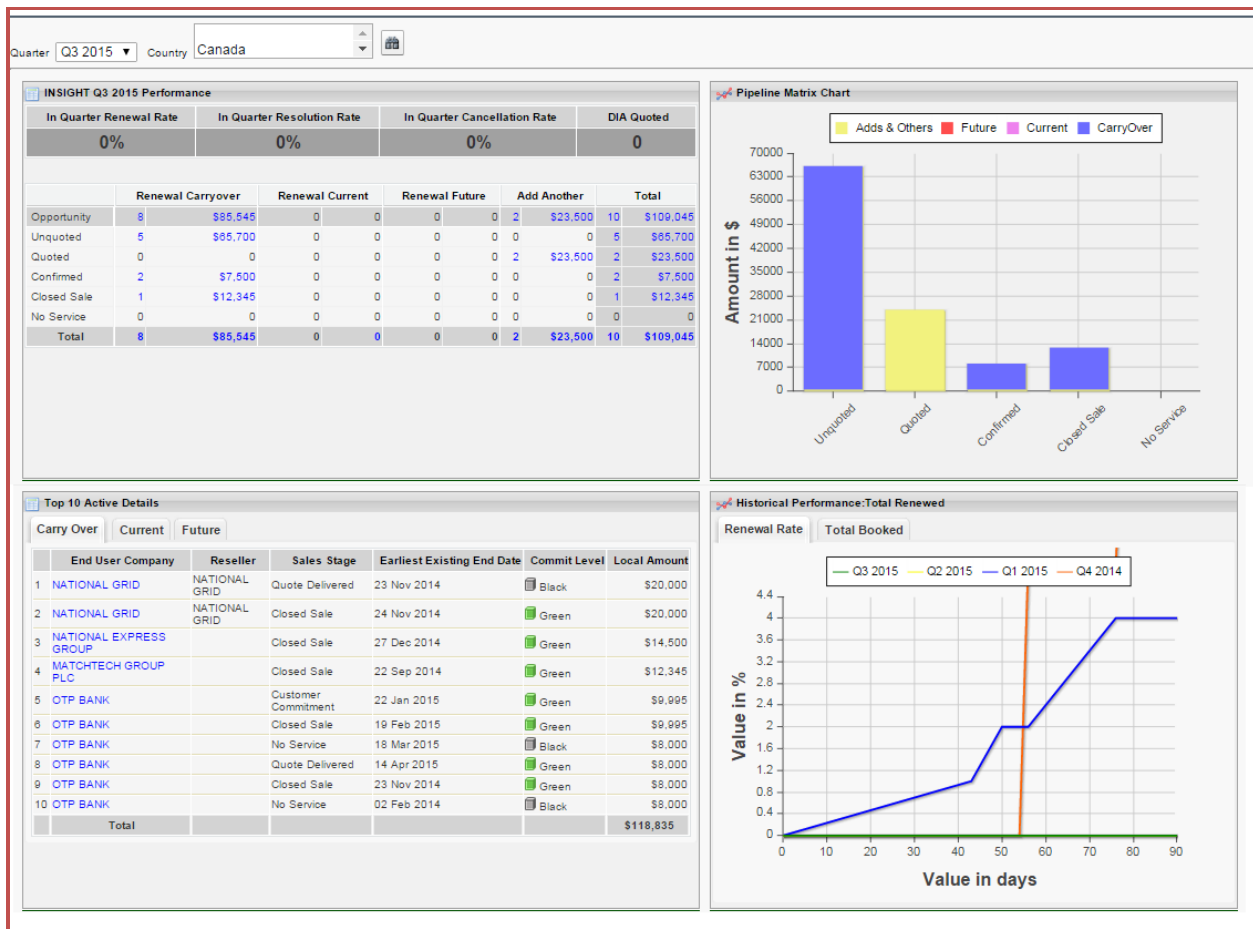


Fig2: Channel Portal - Dashboard

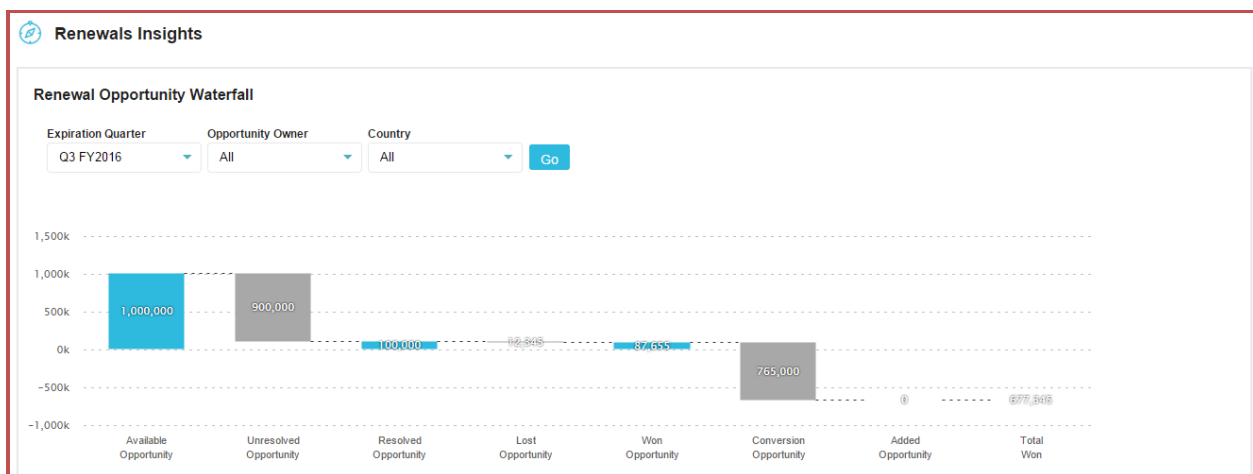


Fig3: Waterfall High charts

BENEFITS

ServiceSource has achieved significant benefits with Salesforce Solution implemented by PES.
The implemented features;

- Provide solution for users to gain insights of opportunities using sales process which helps to create and renew opportunities.
- Provide solution for users to create opportunity, opportunity product and quote from a single page.
- Provide solution for partners to view opportunities /quotes and create request from channel portal.
- Opportunity products can be split to form new opportunities and consolidated back to the original opportunity.
- The implemented feature expands opportunities and reduces administrative burden.
- Automate processes to simplify administrative tasks and gives the agents more time with the clients.
- Helps the users by sending automated follow-ups, notifications and reminders.
- Through the implemented features, waterfall report shows Renewal insights and helps the users to view revenue generated by the opportunities.

Connect | Contact Information



Connect with us anytime for more information:

E-mail: arunabh@positiveedgesolutions.com ; shiven@positiveedgesolutions.com

Also visit us at www.positiveedge.net