

First View: Cloud9 Messenger

CRM Analytics Automatically Delivered To Your Mobile Device

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First Views are designed to introduce research clients to new solutions we think offer innovative approaches for dealing with the sales and marketing challenges that companies face today.

INTRODUCTION

As a senior sales executive, you oversee multiple managers and reps in numerous territories. Your challenge is to stay current, allocate appropriate resources in a timely manner, and present an accurate revenue forecast. However, your sales pipeline is comprised of a jumble of continuously changing opportunities creating a complex puzzle of dollars and deals.

For example, sometimes your pipeline increases significantly with a few large deals just added in, but because the roll-up might no longer include some opportunities that simply “evaporated,” the gross pipeline is net neutral. Which deals went away and which ones are new? What deals require immediate attention? Which will benefit with added resources? Is the pipeline healthy overall, or is it ailing? What’s changed?

CLOUD9 MESSENGER PROFILE

Salesforce and other CRM applications are fine for providing a snapshot of the pipeline’s *current* condition. Manager dashboards give an instantaneous readout of various metrics, but details about changes *over time* have not been available. **Cloud9’s Pipeline Accelerator** application addresses this problem and has been reviewed in a separate *First View*. A related problem—receiving alerts of critical sales data changes in real time (i.e., in time to do something)—is addressed by the Cloud9 Messenger application.

Cloud9 Messenger helps reps, sales managers, and executives stay on top of the changing sales situation courtesy of two innovations. First, like Cloud9’s Pipeline Accelerator, Cloud9 Messenger leverages the Cloud9 Time Machine, the underlying platform that continuously takes snapshots and identifies changes in the Salesforce pipeline data. Cloud9 Messenger then sends alerts of changes to appropriate sales managers’ and reps’ mobile devices or email in-boxes. These real-time notices eliminate unwanted surprises later, but most importantly, the information encourages proactive sales management to affect sales outcomes.

Cloud9 Messenger is offered as both a free, basic service and a premium service that provides additional reports and personalizes the offerings (described in next section).

Standard alerts available via Cloud9 Messenger include:

- Top 10 Opportunities That Have Changed
- Opportunities That Have Not Changed (But Should Have)
- Opportunities Whose Close Date Has Slipped Beyond Current Period
- Opportunities Whose Dollar Value Has Decreased
- Pipeline Accelerator Watch List (available only to Pipeline Accelerator users)

Personalized Alerts

The premium version of the Cloud9 Messenger service offers personalized alerts, focused on what is most important to you. With this fee-based service you tell Messenger what changes or information matter specifically to you; Messenger will then email you whenever it detects any such occurrences. Cloud9 looks at *all* Salesforce fields; therefore you are not limited just to changes in opportunity definitions (i.e., description, amount, close date). You can be alerted to any condition you're interested in: Trouble tickets called in to your customer support desk by current high-value customers; the daily total of calls made by the inside sales team; the number of new leads generated by a specific campaign (i.e., lead source); or any other condition that's based on changing sales data.

Imagine the following scenario for a Road Warrior CSO: You presented your forecast at Monday morning's senior management meeting then left for a week of visits to accounts, prospects and partners. It's now Wednesday afternoon and one of your reps has entered "25%" in the discount field of a \$200,000 deal. Messenger spots the change and deal size, then sends you an email on your PDA. Even while you're out of the office, you can call sales ops and tell them to provide additional prospect-specific value proposition statements to bolster the rep's original proposal, rather than caving on price.

Analytics for the Entire Sales Team

Cloud9 Messenger isn't just for managers; it can also help reps close deals faster by connecting reps with colleagues who have worked on similar deals. Messenger sends email alerts to reps who are pursuing opportunities against the same competitor, in the same business segment, and/or with the same partner in a different region. This ability to tap into best sales practices provides real-time coaching and puts an end to those unanswered email blasts sent out to the entire sales force in search of help.

CONCLUSION

For CSOs running organizations of any size, for traveling managers who want to know immediately when certain sales situations change, and for sales reps who want to close deals faster, Cloud9 Messenger gives new meaning to "You've got mail!"

Any questions or comments about the perspectives presented here should be directed to Jim Dickie (303) 530 6930 or Barry Trailer (415) 924 3500.