



June 16, 2011

IBM Sterling Selling and Fulfillment Suite Helps You Improve the Efficiencies of Your Sales and Call Center



IBM Sterling Selling and Fulfillment Suite delivers significant updates

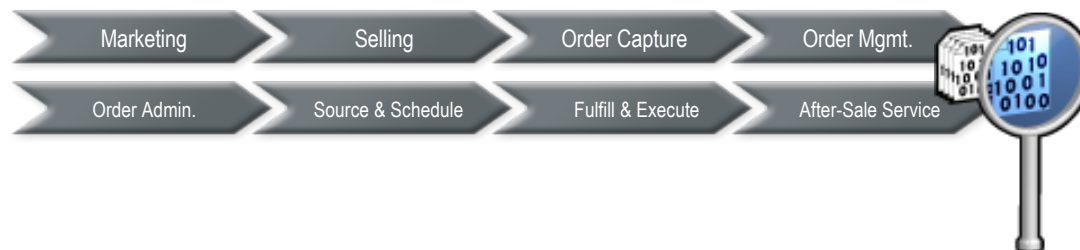
- Salesforce.com integration
- New quoting analytics
- IBM Sterling Order Management / Drop Ship capabilities
- Secure payment server with PA-DSS certification

Companies are seeking the marriage of SFA and Commerce

- Install base of SaaS SFA continues to grow
- Increased need to manage the quoting process within SFA technology
- Quote complex products
- Reduce manual processes and high order errors

Quoting processes today are often manual and lack visibility into the entire process

- Your selling and fulfillment processes may be manual, labor-intensive, costly, and difficult to maintain
- Limited view into your processes to make the right decision



Salesforce.com integration

- Enables your sales people to create quotes for an opportunity within Salesforce.com through integration with IBM Sterling Configure, Price, Quote
- Improves sales force efficiencies and productivity
- For example, one of your sales people can build quote without leaving their Salesforce.com system

The screenshot shows the Salesforce.com interface for an IBM Sterling Quote. The main content area displays 'Quote Details' for 'Quote - Best Edge' with customer information for Sean Forbes. Below this is a table of 'Quote Lines' with columns for Line #, Product, Quantity, Unit Price, Adjustment, and Line Total. The table shows two lines: Line 1 for 'Alpha-Omega Entertainment System fr (100005)' and Line 2 for 'Alpha portable avec processeur Platinum - Blue (10001'. The total amount is \$1280.39.

Line #	Product	Quantity	Unit Price	Adjustment	Line Total
1	Alpha-Omega Entertainment System fr (100005)	1.00 Each	\$799.99	\$0.00	\$799.99
2	Alpha portable avec processeur Platinum - Blue (10001	1.00 Each	\$520.00	\$0.00	\$520.00
					2 Lines

Salesforce.com opportunity

The screenshot shows the Salesforce.com interface for an Opportunity record named 'Best Edge'. The page includes a navigation bar with tabs for Home, Chatter, Start Here, Opportunities, Accounts, Contacts, and Quotes. A left sidebar contains 'Recent Items' and a 'Recycle Bin'. The main content area displays the 'Opportunity Detail' for 'Best Edge', including fields for Opportunity Owner, Amount, Expected Revenue, Opportunity Name, Account Name, Type, Lead Source, and Created/Modified dates. Below the details is a 'Quotes' section with a table listing one quote for 'Best Edge' with a 3.00% discount and a value of \$1,280.39. At the bottom is a 'Primary Quote Lines' table listing five items, including an Alpha-Omega Entertainment System, a plasma HDTV, a DVD player, a remote, and a surround sound system.

Opportunity Detail

Opportunity Owner	Balamurali K. [Change]	Amount	\$1,000,000.00
Private	<input type="checkbox"/>	Expected Revenue	\$100,000.00
Opportunity Name	Best Edge	Close Date	3/17/2011
Account Name	Edge Communications	Next Step	
Type	Existing Customer - Upgrade	Stage	Prospecting
Lead Source	Phone Inquiry	Probability (%)	10%
Created By	Balamurali K. 2/24/2011 12:41 PM	Primary Campaign Source	
Description		Last Modified By	Balamurali K. 2/24/2011 12:45 PM
Custom Links	Delivery Status		

Quotes

Action	Quote Name	Discount (%)	Value After Discounts	Status	Primary	Last Modified Timestamp
Edit Del	Best Edge	3.00	\$1,280.39	Created	<input checked="" type="checkbox"/>	2/24/2011 10:10 AM

Primary Quote Lines

Action	#	Item ID	Product Name	Quantity	Unit Price	Discount (%)	Line Total
Edit Del	1	100005	Alpha-Omega Entertainment System fr	1.0000	\$799.99	0.00	\$799.99
Edit Del	2	100001	Earth 42 "téléviseur plasma" / HDTV	1.0000	\$0.00	0.00	\$0.00
Edit Del	3	100002	Omega balayage progressif Lecteur DVD avec conversion ascendante 1080p	1.0000	\$0.00	0.00	\$0.00
Edit Del	4	100003	Alpha 890 Advanced Universal Remote	1.0000	\$0.00	0.00	\$0.00
Edit Del	5	100004	X-540 Multimedia parleurs son surround (5-pièces)	1.0000	\$0.00	0.00	\$0.00

IBM Sterling CPQ for Salesforce.com – quote details

Quote Details

Quote - Best Edge

Sean Forbes (512)757-6000 sean@edge.com Status: Created Quote ID: Y100000210 This is the primary quote.
Opportunity Name: Best Edge View/Add Notes

Customer Products Terms

Pricing Date: 02/24/2011 Adjustments: -\$39.60 Adjust Price Total: \$1280.39

Quote Lines Recommended Lines

Enter the Product ID

Line #	Product	Quantity	Unit Price	Adjustment	Line Total
1	Alpha-Omega Entertainment System fr (100005)	1.00 Each	\$799.99	\$0.00	\$799.99
2	Alpha portable avec processeur Platinum - Blue (10001'	1.00 Each	\$520.00	\$0.00	\$520.00
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IBM Sterling CPQ for Salesforce.com – product configuration

Product Configurator

Processor, Memory, Hard Drive | Software, Service | Accessories

Processor | Memory | Hard Drive | Battery

Help Me Decide

Processor
Processors are designed for optimized speed of multi media applications!

<input checked="" type="radio"/>	Platinum PL4540 2.85GHz, M-cache, 1088MHz Bus	\$119.99
<input type="radio"/>	Platinum PL5050 3.0GHz, M-cache, 1088MHz Bus	\$139.99
<input type="radio"/>	Platinum PL5555 3.4GHz, M-cache, 1088MHz Bus	\$159.99
<input type="radio"/>	Platinum PL6040 3.53GHz, M-cache, 1088MHz Bus	\$179.99
<input type="radio"/>	Platinum PL6060 3.8GHz, M-cache, 1088MHz Bus	\$199.99

Select Memory >> | Review and Save

Matrix MXLP-210 Laptop Computer

Starting Price: \$314.29
Instant Saving: \$0.00
Subtotal: \$314.29

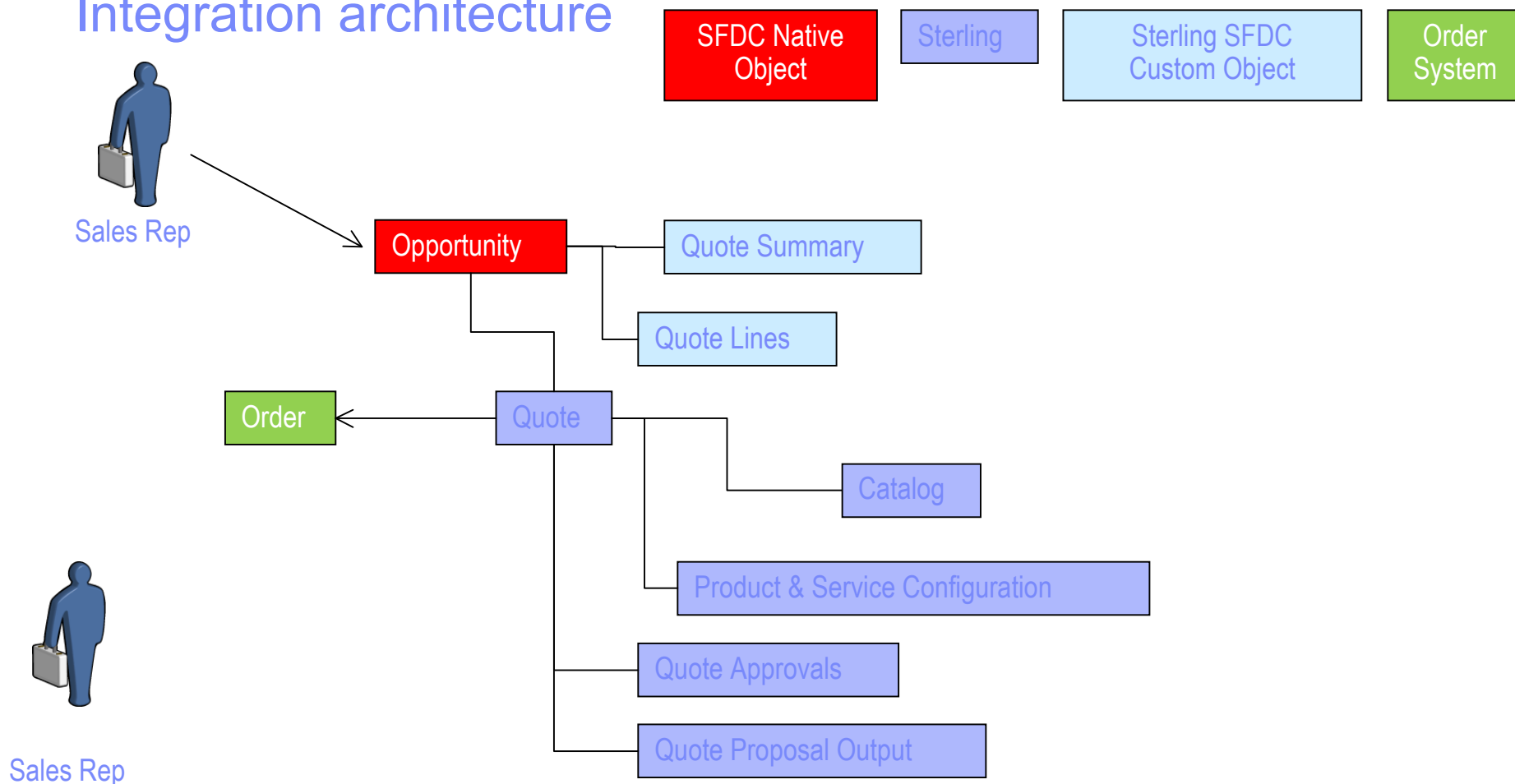
Review and Save

- ▼ My Processor, Memory, Hard Drive
- ▼ My Software, Service
- ▲ My Accessories

Close

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Integration architecture

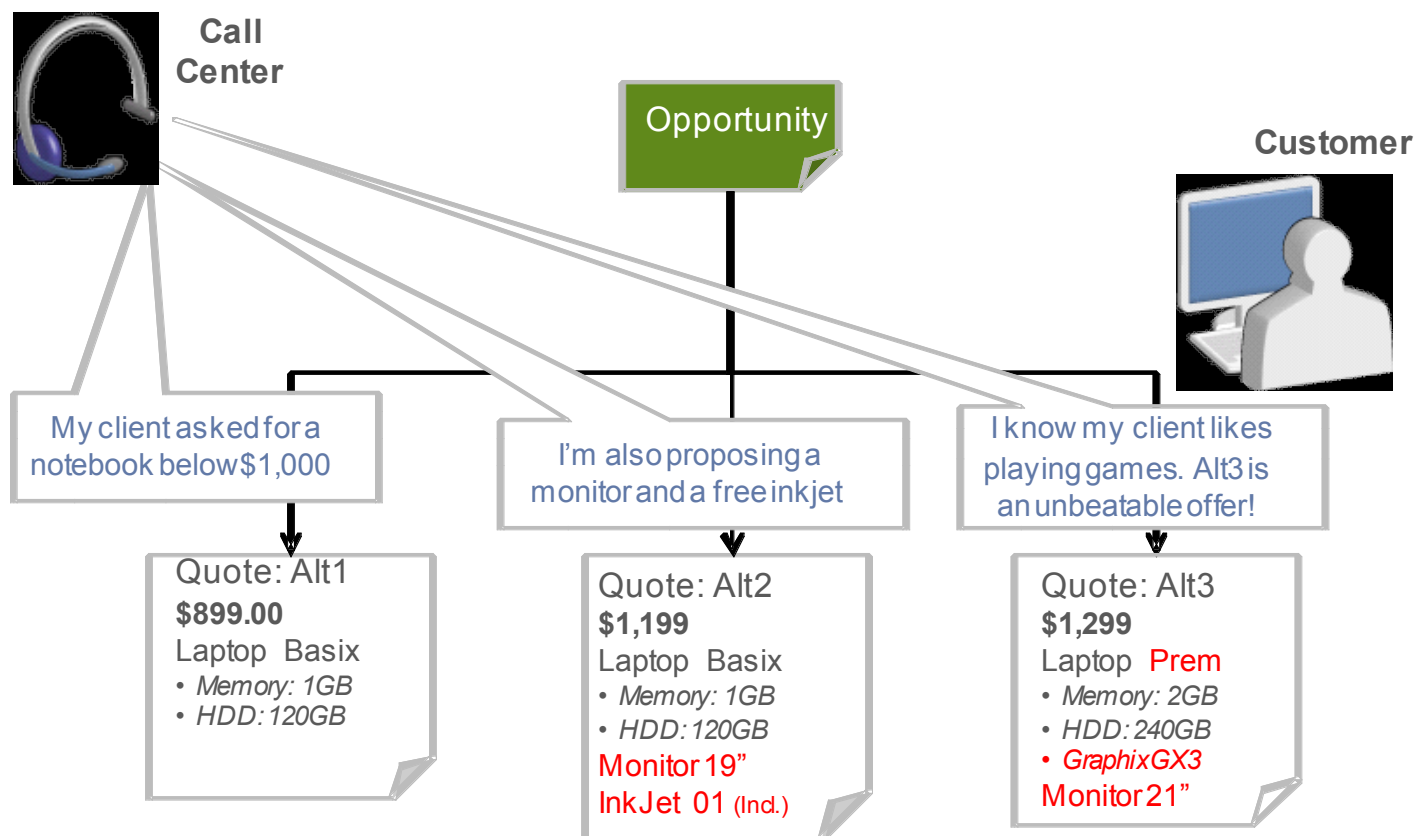


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- One-and-only-one SFDC Account : One-and-only-one Sterling Enterprise
 - Important to note: There is no coordination/synchronization between Call Center Opportunity and Quote creation/management, SFDC Opportunity, and Quote creation/management

IBM Sterling Configure, Price, Quote for Salesforce.com can help companies...

- Improve sales force efficiencies through a seamless sales process
- Drive increased revenue through quoting of complex, configurable products, services, bundles, and packages
- Lower costs and improve order-to-cash processes
- Raise productivity through automated decision-making
- Reduce cycle times across sales process
- Leverage CRM functionality as much as possible to maximize customer value

Quoting in Call Center



- Allows customer service representatives (CSRs) to generate a quote output in a number of formats, according to established pricing, discount, and quote expiration policies

Embed intelligence in your quoting processes

Quoting Process



Intelligence **“ON”** the process

Enable users to respond to trends by viewing dashboards and key performance indicators



Intelligence **“IN”** the process

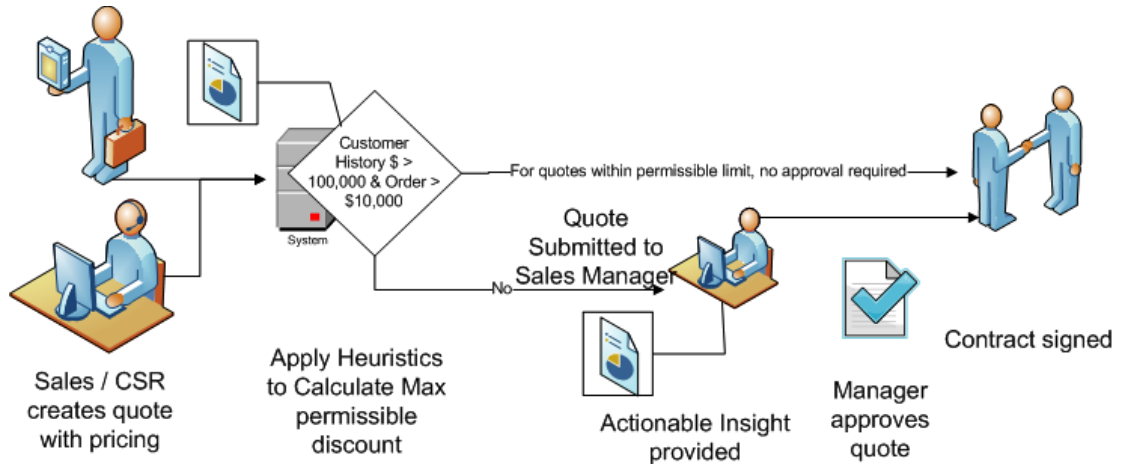
Embed analytics directly in the workflow to enable users access to recommendations based on performance trends to make better decisions



Intelligence **“DRIVING”** the process

Uses events in a selling and fulfillment process to automatically trigger decisions, or even to modify the process flow itself

Quoting analytics

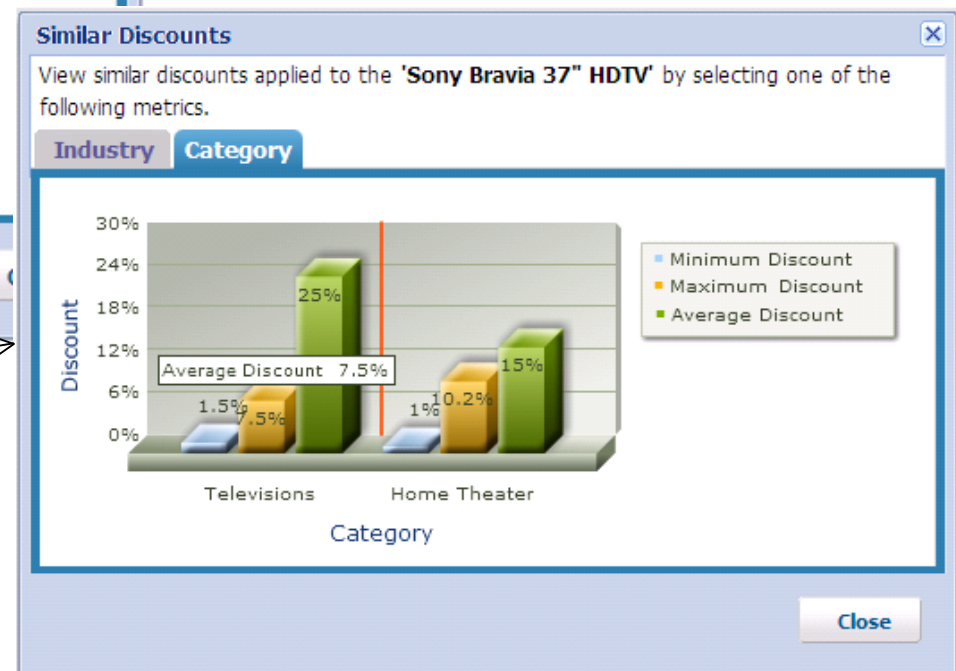
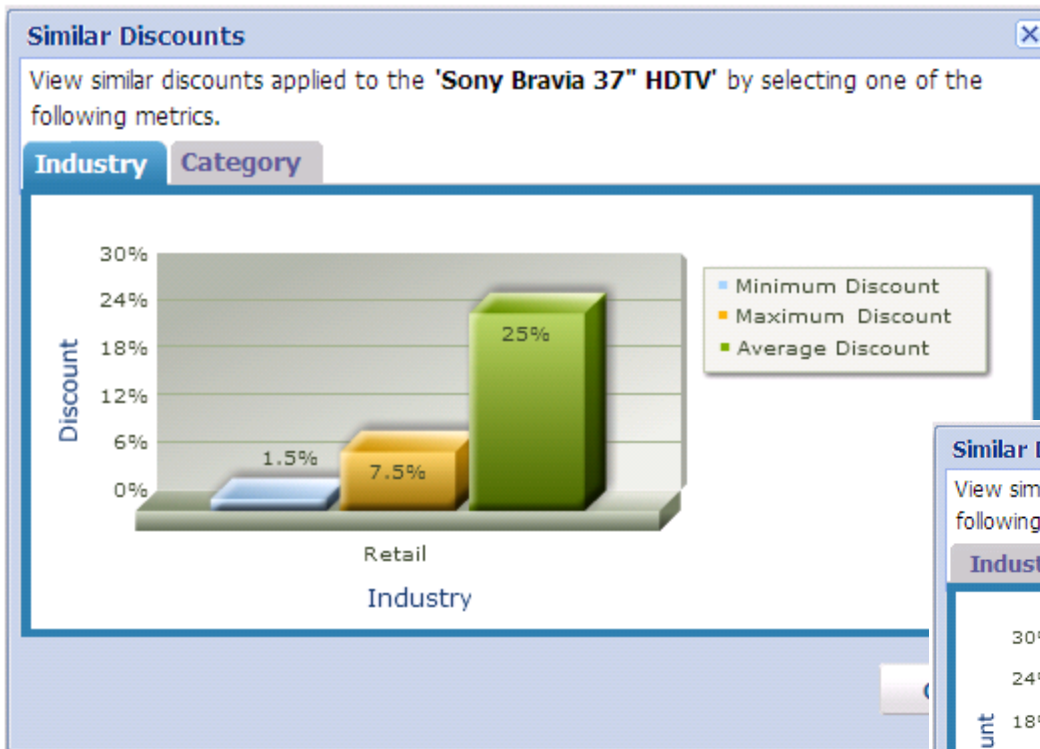


■ Scenario Examples:

- Sales Managers can analyze field sales performance metrics against targets
- Field sales representatives entering a quote for a particular item will see a pop-up for that line item providing them with insight into previously successful quote discount percentages for that product category or industry
- Call Center Agents will be able to view customer category information, such as "valued customer", to provide the appropriate form of appeasement (gift card, discount, etc.)

Smart applications aid decision making: discount advisor new in v.9.1

- Analysis of past successful quotes discounts
- Provides discount recommendations to sales representative while he/she manipulates price adjustments in a quote for optimizing quote margin



Data from Quote analytics is shown to CSR

Smart applications aid decision making: customer rating quote discount advisor new in v.9.1

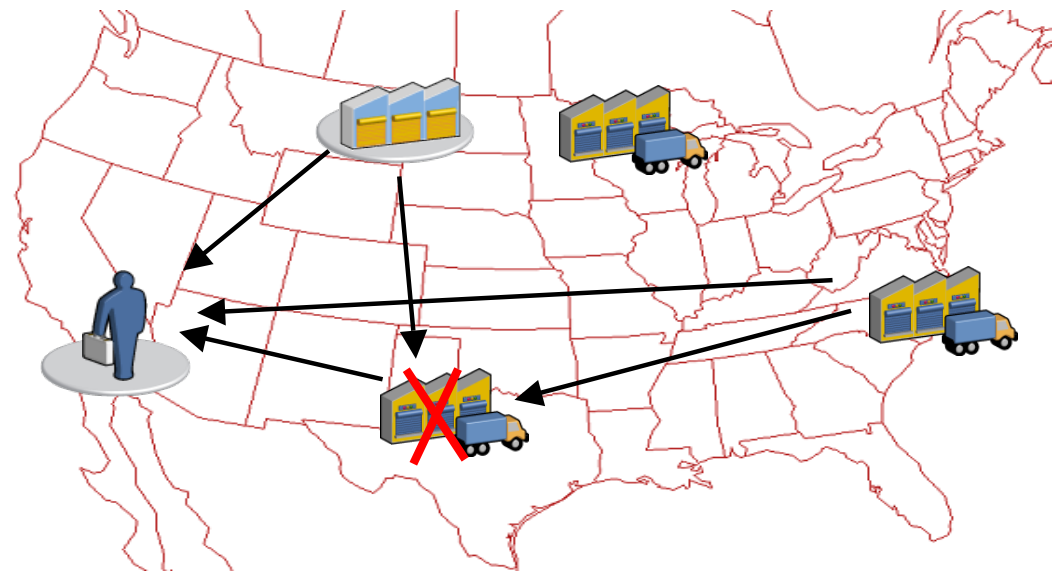
The screenshot displays the 'Add Line Adjustment' application interface. It features a 'Customer Rating' section with a 'High' rating and a 'View Details' link. Below this, there is an 'Adjustment' dropdown menu set to 'Item Accessories-0001' and an 'Add' button. A 'Similar Discounts' button is also visible. The main area contains a table with columns for 'Rule ID' and 'Type'. The table lists 'Item Accessories-0001' with the type 'Item Quantity'. To the right of the table, there are several performance metrics displayed as horizontal bar charts comparing 'Average' values to 'Acme Co.' values:

- LifetimeRevenue:** Average is \$382,523.29; Acme Co. is \$680,033.66.
- LastYearRevenue:** Average is \$112,506.85; Acme Co. is \$200,009.9.
- No. of Hold:** Acme Co. is 1.
- No. of Orders on Hold Last Year:** Acme Co. is 1.
- Grade Description:** Acme Co. is Average.

- Smart applications aid decision-making
- Customer rating informs sales representatives of relationship with customer (for example a high value account)
- Configurable rating factors to meet your business requirements

Order promising enhancements

- Select an optimal path for your customer's order, including calculating the final delivery date including:
 - Various stops and transfers required for final order delivery
 - Track order status and monitor for any shipment delays impacting delivery commitment
- Improved accuracy of order fulfillment
- Efficiently use available inventory when making order fulfillment decisions



Application, database and PA-DSS support

- Application and database support:
 - Support the latest versions of application and database vendors' database, application server, and operating systems:
 - Oracle 11g R2*
 - SQL Server 2008
 - DB2 9.7
 - For those companies who purchase or migrate to the latest version of IBM Sterling Selling and Fulfillment Suite solutions
- Payment Applications-Data Security Standard (PA-DSS) support:
 - The IBM Sterling Sensitive Data Capture Server, is now PA-DSS certified for the IBM Sterling Selling and Fulfillment Suite V9.0 release
 - The IBM Sterling Sensitive Data Capture Server integrates Sterling applications to services that provide credit card tokenization (credit card vault)
 - Scheduled for certification on v9.1

IBM Sterling Selling and Fulfillment Suite V9.1 can help you ...

- Increase your sales force and call center efficiencies and productivity
- Improve your company's quoting process
- Enhance the accuracy of your order fulfillment process



Questions?

