



invisibleCRM

113 Barksdale Professional Center Newark, DE 19711 Avora Holdings, Ltd. www.invisiblecrm.com



Outlook Integration for Amdocs CRM 6

Sales Guide

Table of Contents

PART ONE: INTRODUCTION TO OUTLOOK INTEGRATION FOR AMDOCS CRM (OI4A)	3
WHAT OI4A IS ALL ABOUT: EXECUTIVE SUMMARY.....	3
THE VALUE OF OI4A FOR AMDOCS SALESPEOPLE: SUMMARY.....	3
WHY OUTLOOK INTEGRATION:	4
BENEFITS	9
Integrated Information. Save Time	9
Plan Better. Do More	10
Closer Contact. More Opportunities	10
PART TWO: THE CUSTOMER	10
WHO’S NEEDS OUTLOOK INTEGRATION?.....	10
PART THREE: HELPING YOU MAKE MONEY	13
F.A.Q.	14
WHAT IS OI4A?	14
WHAT ARE THE FEATURES/WHAT CAN IT DO?.....	14
WHAT ARE THE BENEFITS TO CUSTOMERS?	14
WHO ARE POTENTIAL CUSTOMERS/WHAT IS THE MARKET?	15
HOW DOES IT COMPLIMENT AMDOCS CRM?.....	15
WHY SHOULD YOU WANT TO SELL IT?.....	15
WHY IT IS EASY TO SELL?.....	15
WHO CAN YOU CALL FOR HELP?	16
PRODUCT SUPPORT	16
TECHNICAL DOCUMENTATION	18

Part One: Introduction to Outlook Integration for Amdocs CRM (OI4A)

This document is intended to support Amdocs' sales team in their efforts to sell the newest addition to Amdocs CRM, Outlook Integration for Amdocs CRM (henceforth known as OI4A.) It should serve as a point of reference for understanding just what OI4A can do for Amdocs' customers, and provide salespeople with the necessary information to start making sales.

What OI4A is all about: Executive Summary

OI4A provides an easy-to-use and easily implemented integration solution for users of Amdocs CRM and Microsoft Outlook. In designing our application, we modeled the features and functionality in a way best suited to Amdocs CRM's users, salespeople. Our first principle is that salespeople use Outlook as their starting point, referring to it throughout the day, and because it has taken its place as the essential productivity tool, they will use it in addition to all other software. Further to our general motivations for creating OI4A is the understanding that, in fact, Sales Managers are field employees and this means that you will most often find them on the road, and offline.

What OI4A offers is synchronization between Amdocs CRM and Outlook, unifying contact lists, to-do/action items, tasks/action items removing the need to toggle between two sets of information and the bother of double-entry of information. It also adds new email functionality allowing users to capture and add messages to their CRM records. OI4A's synchronization allows users to work with CRM information offline with the confidence that once reconnected the system will be updated automatically.

In addition, OI4A offers further mobility options for the busy Salesperson, as Outlook acts as a common synchronization point for handhelds, PDAs, and smart phones.

The addition of Outlook-like functionality into Amdocs CRM creates a seamless working environment for users of both products. By addressing these functionality and productivity issues, OI4A effectively unites Amdocs CRM and Outlook for salespeople, which is sure to increase the overall user satisfaction and adoption rates.

The Value of OI4A for Amdocs Salespeople: Summary

How does OI4A provide value for Amdocs salespeople? Simple; it fills three of the main criterion for a successful integration product.

- 1) **It solves a real problem:** OI4A integrates the two essential applications for so many sales people giving them synchronicity between Outlook and Amdocs CRM, and it removes the need for multiple-entry of information, a real bother for busy people. AND it satisfies corporations' need for accurate information and user adoption of their CRM system.
- 2) **Customers are asking for it:** Trends and actual customer requests make OI4A something people really want and need. Every major and mid-sized CRM vendor has or is planning to

offer such functionality to their customers, further proof that a quality integration solution added onto Amdocs CRM's popularity is win-win.

- 3) **It is the upsell that sells itself:** For the above reasons and more, OI4A is ready to become a hot seller that requires far less "selling" than other products. Wondering how to get more from already happy customers? Make them happier.

This is an opportunity to sell a solution to a problem that virtually all Amdocs CRM users currently have—An opportunity that you just can't miss.

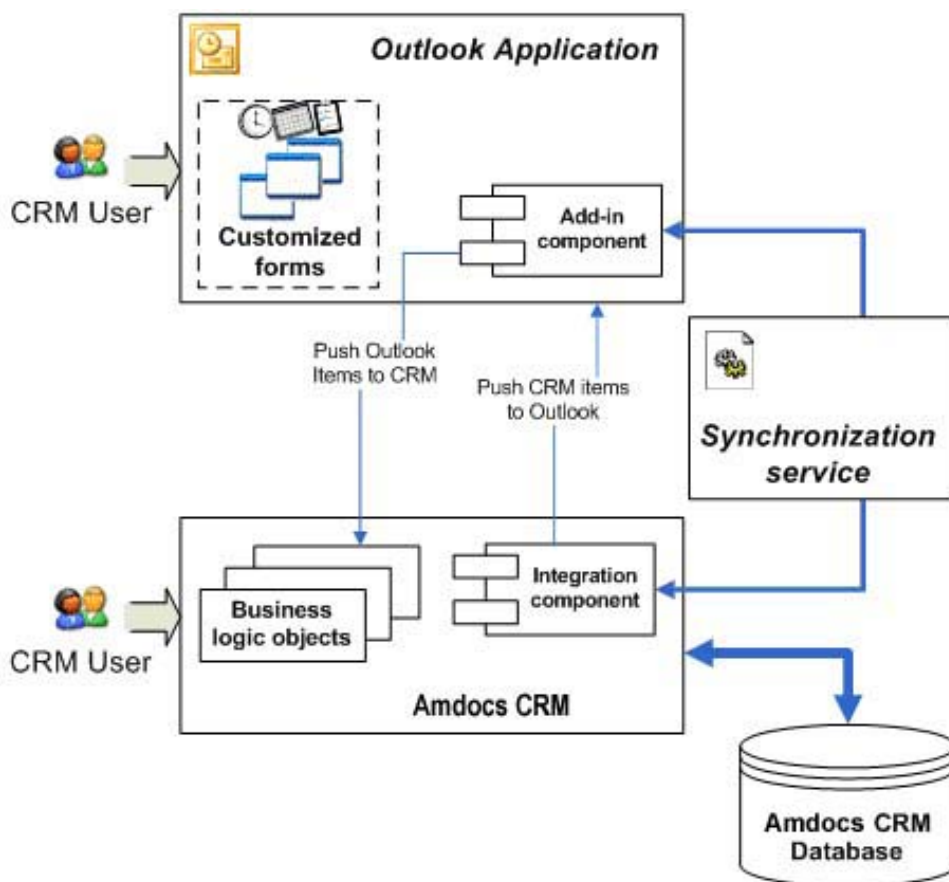
Why Outlook Integration:

i. How OI4A Works

OI4A is small but powerful addition to Amdocs CRM, it works primarily as a background or transparent synchronization service between Outlook and Amdocs CRM. CRM objects are mapped to their counterparts in Microsoft Outlook and visa versa. The synchronization process can be manually initiated but is totally configurable and automated. This means that once configured, the user should never have to think about the synchronization process again; *Customer info is always there*. A further synchronization issue is that once synchronized, Outlook can then act as a synchronization point for PDAs, handhelds, and other mobile technology.

As email is rapidly replacing phone calls as the main means of communicating with customers, salespeople need a better way to track, manage, and use the details found in these messages. OI4A contains an email capture and composition module that allows users to append messages to CRM objects.

In an attempt to make salespeople's' working environment as unified as possible, OI4A adds Outlook-like features into Amdocs CRM. A New Calendar View using the Outlook calendar format for viewing action items provides users with an easy/seamless transition between their two main programs.



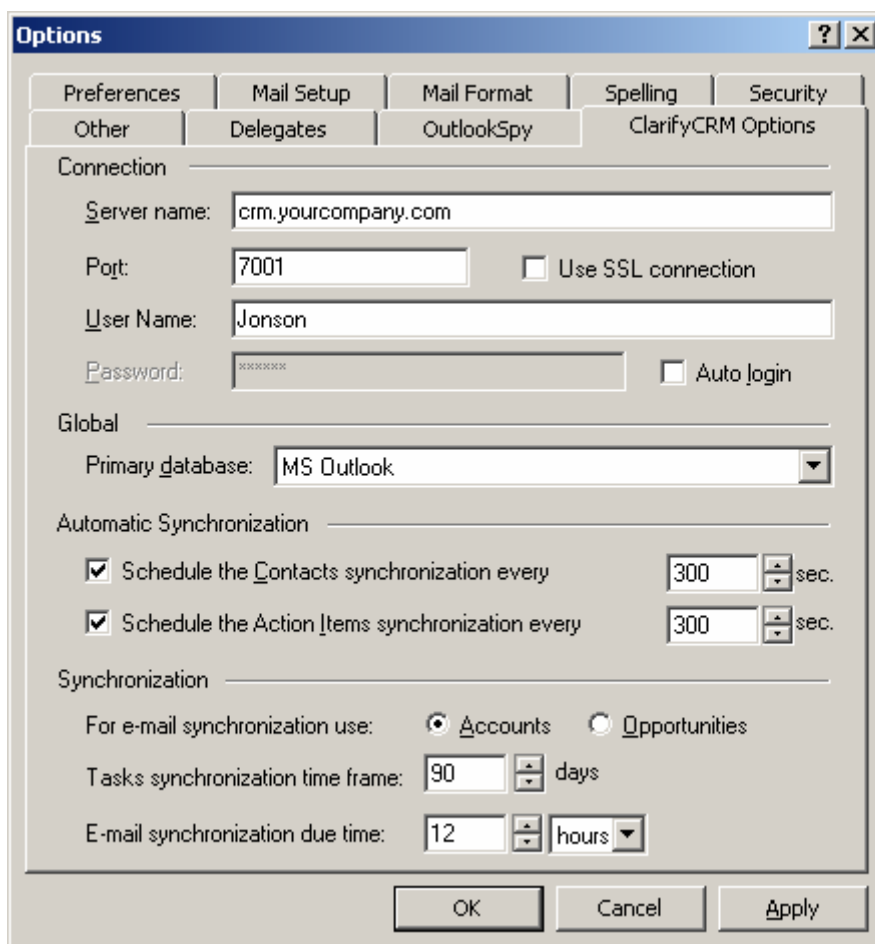
ii. Features Overview

The following is a breakdown of the key features of OI4A. These should help in grasping the full functionality of the product as well as being very attractive to our intended targets, busy salespeople!

Synchronization:

Outlook Integration for Amdocs CRM is designed to be transparent and fully integrated, so that the user never needs to think about how it works, but simply **‘how did I ever live without it?’**

- ⇒ Initial synchronization of contacts is manual, subsequent one is either manual or automatic. Synchronization of tasks and calendar items is always automatic. Synchronization of emails is always manual



Options [?] [X]

Preferences | Mail Setup | Mail Format | Spelling | Security
Other | Delegates | OutlookSpy | ClarifyCRM Options

Connection

Server name:

Port: Use SSL connection

User Name:

Password: Auto login

Global

Primary database:

Automatic Synchronization

Schedule the Contacts synchronization every sec.

Schedule the Action Items synchronization every sec.

Synchronization

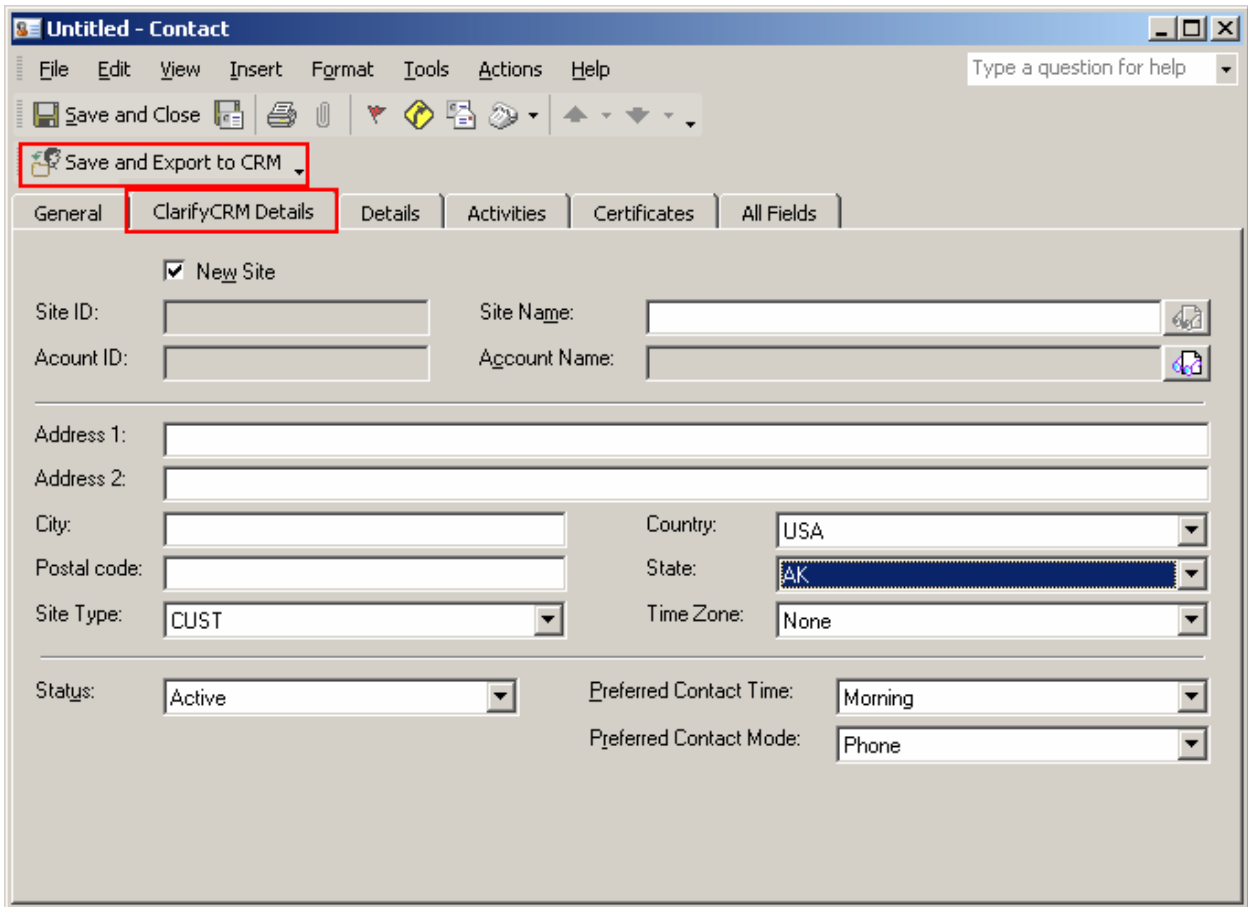
For e-mail synchronization use: Accounts Opportunities

Tasks synchronization time frame: days

E-mail synchronization due time: hours

OK Cancel Apply

⇒ Additionally, synchronization can be initiated by the user at any time by using the conveniently placed buttons on the taskbars in both Outlook and Amdocs CRM

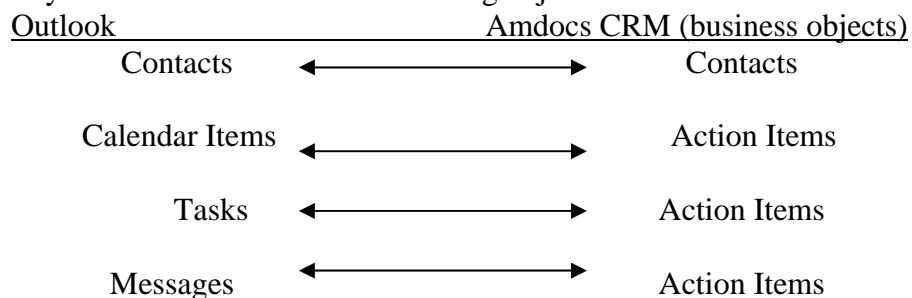


The screenshot shows the 'Untitled - Contact' window with the following details:

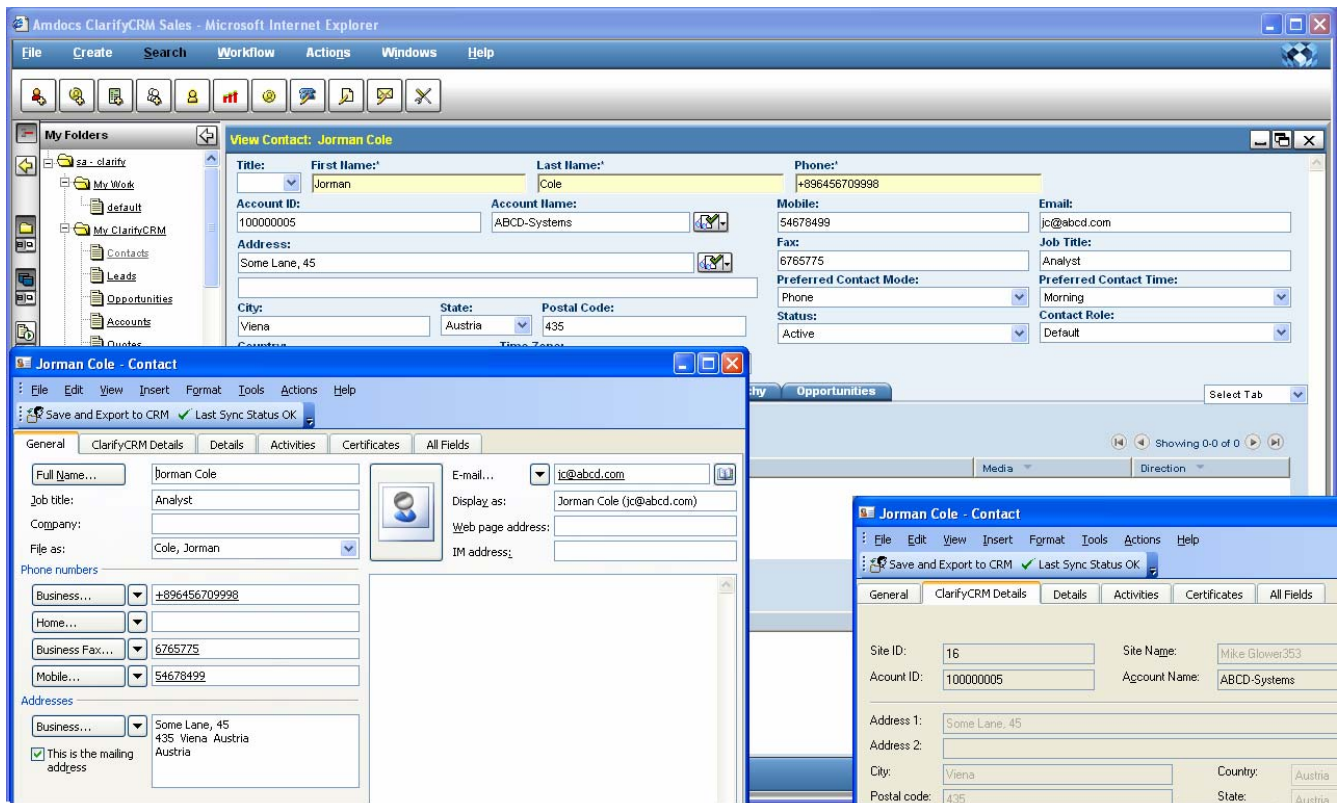
- Menu: File, Edit, View, Insert, Format, Tools, Actions, Help
- Buttons: Save and Close, Save and Export to CRM (highlighted), Print, Attach, Undo, Redo, Navigation arrows
- Tabs: General, ClarifyCRM Details (selected), Details, Activities, Certificates, All Fields
- Form Fields:
 - New Site
 - Site ID: [Text Box] Site Name: [Text Box]
 - Account ID: [Text Box] Account Name: [Text Box]
 - Address 1: [Text Box] Address 2: [Text Box]
 - City: [Text Box] Country: USA (dropdown)
 - Postal code: [Text Box] State: AK (dropdown)
 - Site Type: CUST (dropdown) Time Zone: None (dropdown)
 - Status: Active (dropdown) Preferred Contact Time: Morning (dropdown)
 - Preferred Contact Mode: Phone (dropdown)

⇒ CRM object fields are linked to standard fields in Outlook and special fields are created and accessed via new tabs. CRM objects from one side are mapped to their counterparts on the other, providing a seamless link-up of information and ensuring that **No information is left behind!**

⇒ Information is synchronized between the following objects:



Contact lists are synchronized and CRM details are pushed to new tabs and fields in Outlook



⇒ List filtration options allow users to better configure how they view customer information.

⇒ Custom forms (located under new tabs) are created in Outlook. These new screens (e.g Show CRM Properties) contain CRM details for contacts, tasks.....

Messaging:

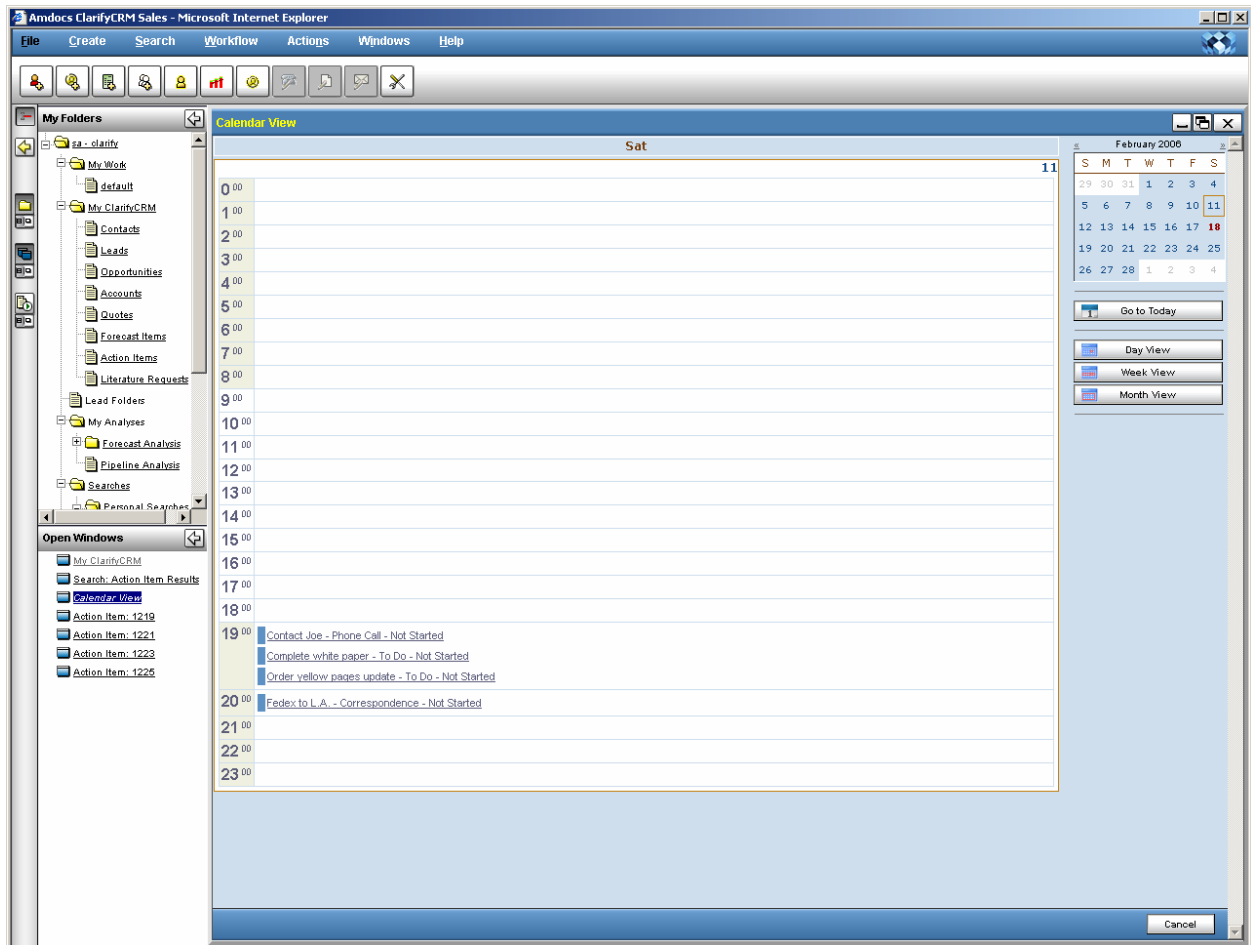
⇒ New messaging functionality allows salespeople to make better use of customer messages and the information they contain.

- Manual capture of incoming emails: scans inbound messages for CRM details and transfers them to the Amdocs CRM data base, appending them to the appropriate CRM records.
- Allows users to easily associate messages to contacts, accounts, opportunities and leads to build customer info
- Useful for: triggering workflow, assigning follow-up activity, trouble ticket registration and incident escalation, to-do/appointments, task routing

> Message composition functionality is added to Amdocs CRM. This allows users to easily compose messages from within Outlook and associate with CRM objects. Standard messages fields are used, and messages can be easily attached to contact, account, and/or opportunities.

Calendar:

OI4A adds a calendar view to Amdocs CRM that allows salespeople to work with action items in a more comfortable format and further lessening the transition between Outlook and Amdocs CRM. It is modeled Outlook's calendar which is familiar to the majority of sales professionals. Calendar formats include daily, weekly, and monthly views.



iii. Top OI4A Benefits

Benefits

With Outlook Integration for Amdocs CRM the benefits are clear: **Organize** your critical customer information in Amdocs CRM using the familiar and flexible structure of Outlook, **Synchronize** your data to seamlessly integrate your workspaces, and find your sales potential **Realized...**

Integrated Information. Save Time

Information shared between your two most used programs

- Does away with the need to juggle two different contact lists
- Input information once and it is automatically shared
- Ensures up-to-date customer info by automatically updating info collected while offline
- Keep customer info at hand with PDA sync

Plan Better. Do More

See your commitments better, and schedule your time more efficiently

- Prioritize your commitments quicker with unified to-do and action items
- Schedule and visualize your day more easily by using one easy to read calendar
- Manage all of your obligations in Amdocs CRM with the familiar calendar add-in

Closer Contact. More Opportunities

Recognize and act on sales opportunities right away

- Make communication with customers easier and more efficient
- Never lose another customer request by capturing E-mails right to customer file
- Use customer inquiries appended to file to better recognize and plan up-sell opportunities
- Make follow-ups quicker by composing messages from Amdocs CRM
- Keep on top of customer needs by organizing sales calls

Part Two: The Customer

Who's Needs Outlook Integration?

i. Benefits to the Customer

It can be assumed that when selling OI4A there will be essentially two types of customers: end users (our friend the salesperson) and company management (consisting of owners, stakeholders, and project leaders.)

⇒ **For end users:**

Selling OI4A to salespeople should not be a Herculean task, as you've no doubt discovered by now it solves real problems that irritate the users of these two products, without exception. It is an extremely easy-to-use application that requires almost no set-up and with intuitive functionality there is little for the new user to learn.

For the average salesperson OI4A provides the kind of extra functionality that makes it a must have application:

- ✓ **Mobility**: Sales reps can have their CRM data on-hand no matter where they are. Working with CRM records while flying is now possible, and changes/updates are made automatically when reconnected.
- ✓ **Integration**: Automatically synchronized contacts and tasks lists eliminate the need for double-entry of information (an extremely frustrating waste of time) and brings greater consistency to their daily routine.
- ✓ **E-mail**: Gives salespeople the ability to better organize email and mine customer messages for details that can help them make sales. Automatic email capture and the ability to append messages to CRM records saves time and builds customer records.
- ✓ **Device Sync**: With CRM data synced with Outlook, Salespeople are able to get their customer info onto their handheld gadgets; Turning that new toy into an even more powerful productivity tool.

⇒ **For Company Management:**

The approach to selling OI4A to a company's management is strategically different, but no less appealing.

Management and owners are interested in ROI. They have already invested in Amdocs CRM and are always interested in ways to improve and enhance the ways their CRM can "give back."

It can also be assumed that there exists a certain degree of resistance from their sales force that managers would be all too happy to live without.

- ✓ **User adoption**: Sales reps are using the CRM. But they use it as little as possible. Multi-entries and the hassle of juggling their two favourite software suites, having to be chained to an internet connection and several drawbacks have made sure of this. OI4A solves these problems, salespeople are happy campers and using the system
- ✓ **Automatically Updated CRM**: A CRM system is only as good as the information entered into it. Making salespeople enter information is often difficult. OI4A solves this conundrum through its transparent and automated synchronization process that delivers data to the system ensuring that the CRM is always accurate and up-to-date. Management has to depend less on each individual salesperson to have accurate customer data.

ii. How it Compliments Amdocs CRM

OI4A exists because there is a real need for the functionality it brings: filling the gap between salespeople's two chief applications. Therefore, OI4A should not be seen as an improvement on Amdocs CRM but rather a logical and necessary extension of it. It brings the tools and processes to fully integrate the two solutions making them work together, and making OI4A a must-have addition for both salespeople and corporations.

iii. Problem Solving:



The following chart contains some common problems faced by users of Amdocs CRM and Outlook, how OI4A fixes these problems, and the results. This could be used in presentations/demonstrations, and is also useful in describing usage scenarios to potential customers.

Challenges	OI4A Solutions	Benefits
<ul style="list-style-type: none"> ○ Sales Managers work “Offline” while on the road (customer information could be useful in customer meetings) ○ Multiple entry of information (the definition of time-wasting) ○ Email is becoming the preferred method of communications between sales reps and customers ○ Juggling two conflicting contact and task lists is unproductive and confusing 	<ul style="list-style-type: none"> ● CRM data is synced with Outlook providing salespeople with access to customer info while offline. Auto-sync of data once connected ensures that CRM records are kept current ● Transparent synchronization ensures that contacts, tasks and the rest of CRM and Outlook objects get synchronized and stay that way ● Capture inbound E-mail in Outlook and manually transfer it to Amdocs CRM. Mine emails for details and use messages to build customer intel. Easily compose messages within Outlook and associate emails to Amdocs CRM objects ● A totally unified workspace for salespeople eliminates the need to think about two different sets of info, and the new calendar function within Amdocs CRM provides familiar organization 	<ul style="list-style-type: none"> ✓ Sales people have access to customer data no matter where they are, and CRM system records are kept updated with new information. ✓ Everyone is on the same page, an acute irritation is relived, salespeople are that much more productive and happy. ✓ Emails are better organized, all potential customer information/opportunities are extracted from messages, and CRM data is built-up ✓ Instant productivity boost, and a added user-friendliness
<ul style="list-style-type: none"> ○ CRM is not kept up-to-date ○ Salespeople are reluctant to use the CRM system 	<ul style="list-style-type: none"> ● Automated synchronization with the CRM system ensures a company’s management that whether they know it or not, salespeople are keeping customer information current ● New and immediate benefits to the user make the CRM work more like they do, and the more they use it, the more it rewards them 	<ul style="list-style-type: none"> ✓ A company’s management sees ROI advantages, and realize the dream of an accurate CRM ✓ Immediate improvement to the overall user adoption. ROI benefits, and sales

		managers realize the dream of having and accurate CRM without the headaches
--	--	---

Part Three: Helping you *Make Money*

i. Why get excited about OI4A?

Why get excited about OI4A? Because it is an exciting product that bridges the gap between the salesperson's two key applications-the corporate CRM (Amdocs CRM) and their personal Email Client/Organizer (MS Outlook.) It is also an exciting sales opportunity as OI4A's features make for a easy chance to **upsell current Amdocs customers** with a pitch directed at both top management (who need to have SFA source data in the corporate repository) and to salespeople (who desperately want to avoid double-entry, and any type of corporate applications all together.)

ii. Market Demand and the Competitive Edge

Most CRM providers currently have or are planning to implement solutions that geared toward the user, attempting to increase the overall user adoption rates for their software. What OI4A offers is the ability to realize this goal immediately. OI4A is the user adoption solution for companies that have implements Amdocs CRM, and salespeople who depend on MS Outlook as their daily organizer. Not only does it present Amdocs' sales team with a superlative opportunity for upselling, it completes the functionality of Amdocs CRM, giving Amdocs CRM customers and users the value-added functionality that they have come to expect.

iii. Our Team is Your Team

Our support team is made-up of product experts who have participated in the design of OI4A, this makes them specialists. They can help answer your or your customer questions on any aspect of OI4A, provide you with further documentations, or even assist you with demos. They're friendly, knowledgeable, and, of course, speak English.

Here is our support team and how you can get in touch with them:

Vlad Voskresensky
(CEO)

+1 (650) 391 58 63

Vlad.Voskresensky@invisiblecrm.com



Anton Zubenko
(Account Manager)

+1 (650) 619-34-88

Anton.Zubenko@invisiblecrm.com

iv. Supporting Documentation.

Contained in this document package:

- OI4A Sales Guide
- OI4A White Paper
- OI4A Brochure

Furthermore, OI4A comes with User Guide oriented to end users and an Installation and Administration Guide oriented to technical staff who will deploy, support and maintain the product.

Also users and administrators may consult the OI4A web site (<http://www.crm-outlook-integration.com/>) any time to get more information or to download updates.

F.A.Q.

What is OI4A?

OI4A is an integration solution for salespeople and their two key applications, Amdocs CRM and Microsoft Outlook.

It provides synchronization for contact lists, to-do/action items, and enhances the functionality of both programs.

What are the features/what can it do?

- > Enable sync with data collected offline
- > Synchronize contact list
- > Synchronize action items to calendar items
- > Capture incoming emails & compose outbound messages, related to CRM records
- > Attach messages & calendar items to Amdocs CRM objects (account, contact, opportunity, lead)
- > Sync CRM data with Handheld devices via Outlook

What are the benefits to customers?

- > *Focus on seamless integration*
- > *Transparent synchronization*
- > *Support of offline mode*
- > *Support of mobile devices*
- > *Easy configuration*
- > *Quick implementation*
- > *Low cost of training*
- > *Better overall user adoption*
- > *Secure data flow*

Who are potential customers/what is the market?

The main target for OI4A is existing Amdocs CRM customers. They are aware of the issues they'd like solved and need only to be shown how OI4A can help. Also, Amdocs CRM customers who mostly use the Service and Call Center modules. In order to deploy and go to live with Sales Module the customer needs to have Outlook integration

How does it compliment Amdocs CRM?

Outlook is one of important communication channel for sales forces to talk to customers. It is important to capture the history of communications and store it in corporate CRM database. This product is oriented to fill this gap in out-of-the-box Amdocs CRM functionality. The former classic client integration with Outlook covered few features, while the new OI4A covers all important scenarios of integration.

Why should you want to sell it?

The product is a good up-sell opportunity. OI4A makes end-users' lives easier, which helps to ensure the system is used to its full potential, and that managements headaches from trying to force usage are a thing of the past. The product populates the corporate database with source data increasing the value of collected data and allowing both salespeople and their managers to rely on the CRM system and the accuracy of the information it contains.

Why it is easy to sell?

It is easy, because it solves real problems that bother end-users every day, and problems that trouble managers and corporations when they consider user adoption, and the ROI on their CRM system.

It's simple: Ask salespeople how they like to handle double-entry of contact, activity/task information etc., show them a benefits list, run a demo, and every user of Amdocs CRM and MS Outlook will be nodding along.

Implementation roadmap

Complex corporate environments typically assume specific technical infrastructures and security policies, established in the terms of the organization. Moreover, Amdocs CRM instances are often customized to reflect specific customer's needs in additional functionality.

These often assume the need in extra implementation services and adjustment of OOB OI4A product to suite customer's production environment. Well grained pre-production investigation is to be taken to evaluate the need in such extra actions.

Hence typical product implementation and deployment roadmap looks as follows:

- > Investigation into Customer's corporate environment (via questionnaire and consultation)
- > Invisible CRM internal acceptance test on customer's environment



amount Amdocs paid to InvisibleCRM for the licenses purchased by the End User. For Support Option A, the fee shall be ten percent (10%) of the net license fees Amdocs paid to InvisibleCRM, and for Support Option C, the fee shall be twelve percent (12%) of the net license fees Amdocs paid to InvisibleCRM.

Technical Documentation

OI4A is based on a robust and dependable design. Here is a visual schematic of the solution architecture.

