



invisibleCRM

InvisibleBridge.

CRM Idol 2011 demo



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Power of Enterprise Automation within Microsoft Office

Agenda

1. Who we are
2. What we do
3. Live product demo
4. Q&A
5. Summary



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Who we are

Analysts and
Experts insights



NUCLEUS
RESEARCH



- Effective CRM today is all about capturing and recognizing info from various channels. Effective CRM tomorrow is all about blending of data, experience and business logic from various systems into “CRM automation cloud”
- InvisibleCRM is provider of productivity tools which integrates Enterprise applications (CRM, ERP, DM) with Personal user environments (Windows, Outlook, Lotus, Mobile, etc.)
- We bridge the gap between how enterprise systems work and how people work every day



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Who we are: Accelerating Success



invisibleCRM®
Founded

2005



cabrt
Venture Fund



MTVP



SalesDesktop, SalesFolder,
SalesAlerts prototypes
developed

...




amdocs
Partnership

Gartner
names InvisibleCRM
as Cool Vendor


SmartFolder for
EMC²
Documentum

SalesFolder
and SalesAlerts for
salesforce.com

SalesDesktop for
salesforce.com
Success On Demand™




SUGARCRM
COMMERCIAL OPEN SOURCE
Partnership




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UNDER THE
RADAR
CATEGORY
WINNER 2007



IBM
Business
Partner



ORACLE
PartnerNetwork
MEMBER PARTNER

2011



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Who we are: key people



Vlad Voskresensky, CEO

Vlad is an original founder of InvisibleCRM. A strong management and technical background make him an ideal leader.



Dwight DePalmer, President

A veteran of the CRM industry, held positions ranging from RVP of Sales to VP, Product Development with companies such as Clarify, Siebel, XPLANE and Oracle.



Jeff Krider, COO

Jeff is an IT veteran and brings over 28 years of sales, marketing and executive leadership in the technology industry. Prior to joining InvisibleCRM, he held C-level positions in IBM, eNetworks, Accenture.



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Who We Are: really key people



Kostya,
Solution
Architect



Slava,
Senior
Developer



Anton,
Technical
Account Manager

And we all TOGETHER!





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Who We Are: our top 3 qualities

We are ambitious!

We are innovative!



... and we love fun!



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Do not change people, change software!

Old Way

Enterprise Drives Required Usage

- Usage is a condition of employment
- Calendar belongs to corporation
- Work tools provided almost exclusively by internal IT

Although on-demand CRM was, in many cases, easier to use and adopt than traditional CRM, it didn't solve the user adoption challenge: people want to work with a familiar workspace.

© Nucleus
Research Note

New Era

Personal & Work Boundaries Collapsed

- We do work at home and personal things at work
- Consumerization of the desktop
- Work tools span corporate systems and services in the cloud
- IT seeks “zero maintenance” solutions

“User Adoption is key... Sales users would often prefer to live in their e-mail application - typically Microsoft Outlook and Lotus Notes.”

© Gartner
Cool Vendors in CRM



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What we do: theory & practice



End-User Applications

SalesDesktop

LotusDesktop

SalesFolder

SalesAlerts



InvisibleBridge™
Platform

Outlook
Bridge

Lotus
Bridge

Folder
Bridge

Alerts
Bridge

InvisibleSync Engine

Back Office Applications

Enterprise Systems or
Computing Cloud

(CRM, ERP, ECM +)



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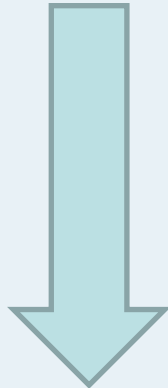
What We Do: ...and how it fits

Working with CRM data through familiar personal environments



- Shorter learning curve
- Better adoption
- Increased CRM usability

No double data entry



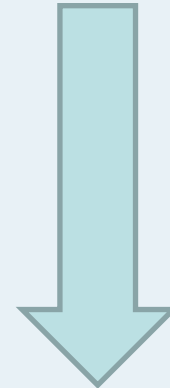
- More CRM data submitted
- Higher CRM data quality
- Better reporting & analysis

Automated CRM data management



- Less time spent on data management
- More time spent on customer relations, sales and marketing activities

CRM integration with other apps



- CRM data available in other apps
- Higher work quality and efficiency

Much better CRM ROI!



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Target audience: CRM Vendors

ORACLE

ORACLE FUSION
Next Generation Applications

SIEBEL

ORACLE
ON DEMAND

PeopleSoft

e-businesssuite


Microsoft

salesforce.com
Success On Demand


NETSUITE


Workbooks.com

IBM **Lotus**

Cisco
webex

Deltek 

amdocs


SUGARCRM



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Competition

CRM



(Applications with No Platform)



ERP

Duet™ for Microsoft® Office and SAP®



(Platform: No Applications)



Duet™ for Microsoft® Office and SAP®

ECM

SCM



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2. What We Do: our future

Strategic Directions

- Keep bridging Personal environments with Enterprise environments
- Mobility
- InvisibleStudio
- “Consumerization”





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Live Demo



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OutlookBridge-based integration: Salesforce CRM objects within Outlook

The screenshot displays the Microsoft Outlook interface with the 'Contacts' view selected. The ribbon at the top contains various actions such as 'New Contact', 'Delete', 'Forward', and 'Share'. The left-hand navigation pane shows folders like 'Inbox', 'Drafts', and 'Contacts'. The main area displays a list of contacts from Salesforce CRM, organized by account. The table below shows the data for these contacts.

Account Name	Account Name	Company	Department	Lead Source	Business Phone	Mobile Phone	E-level
Rich	Rich	Business Endurance	Business Endurance				rich@
Account Name: Cypress Communications (1 item)							
Lee, Robert	Cypress Communications	Cypress Communicat...		Web	(312) 889-8885	(818) 330-4788	roblee
Account Name: DataCore Software Corporation (1 item)							
Gelado, Sabrina	DataCore Software Corporation	DataCore Software Co...			(954) 377-8021		sabrm
Account Name: Edge Communications (3 items)							
Lee, Robert	Edge Communications	Edge Communications			1,560,999		roblee
Forbes, Sean	Edge Communications	Edge Communications Finance		Trade Show	(512) 757-4888	(512) 757-4841	seanf
Gonzalez, Rose	Edge Communications	Edge Communications Procurement			(512) 757-4888	(512) 757-9349	rose@
Account Name: Express Logistics and Transport (2 items)							
Davis, Josh	Express Logistics and Transport	Express Logistics an...	Warehouse Mgmt	Word of mouth	(503) 421-7888	(503) 421-4387	jdavis
Levy, Bobara	Express Logistics and Transport	Express Logistics an...	Operations	Word of mouth	(503) 421-7888	(503) 421-5451	blevy
Account Name: GenePoint (1 item)							
Frank, Edna	GenePoint	GenePoint	Technology	Partner	(650) 867-3456	(650) 867-7696	efrank
Account Name: Grand Hotels & Resorts Ltd (2 items)							
Bar, Tim	Grand Hotels & Resorts Ltd	Grand Hotels & Resi...	Finance		(312) 596-1888	(312) 596-1234	bar_t
Bond, John	Grand Hotels & Resorts Ltd	Grand Hotels & Resi...	Facilities	External Referral	(312) 596-1888	(312) 596-1543	bond_
Account Name: Hertz (1 item)							
Szydenko, Aleksey	Hertz	Hertz		Web	8 095 272-32-97		admin
Account Name: Infinity (1 item)							
Z, Burlington	Infinity	Infinity	department				teif_te
Account Name: Insider Software (1 item)							
Leeds, Robert	Insider Software	Insider Software		Web	(520) 229-1111		roblee

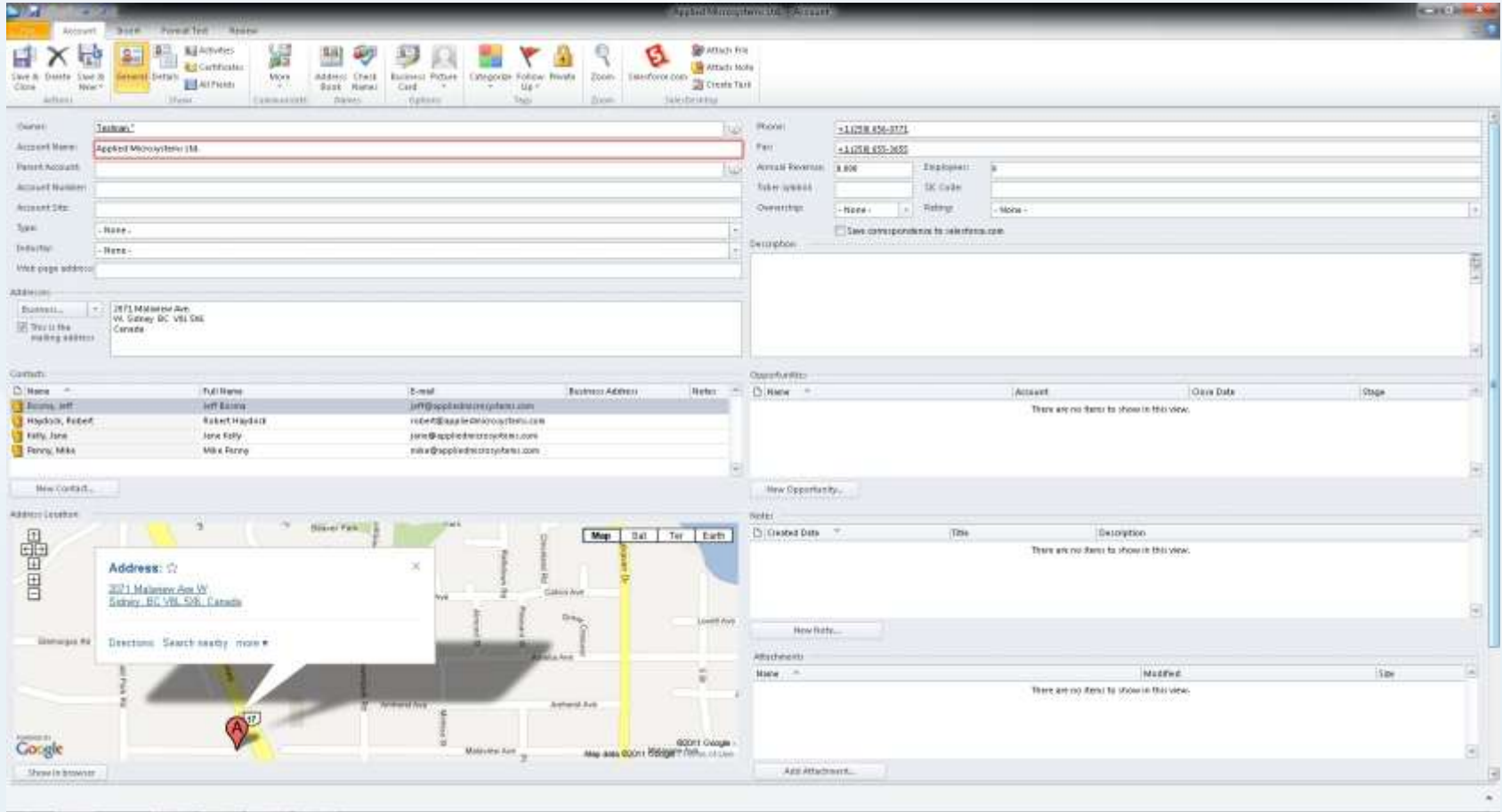
Salesforce Contacts List View



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OutlookBridge-based integration: Salesforce CRM objects within Outlook



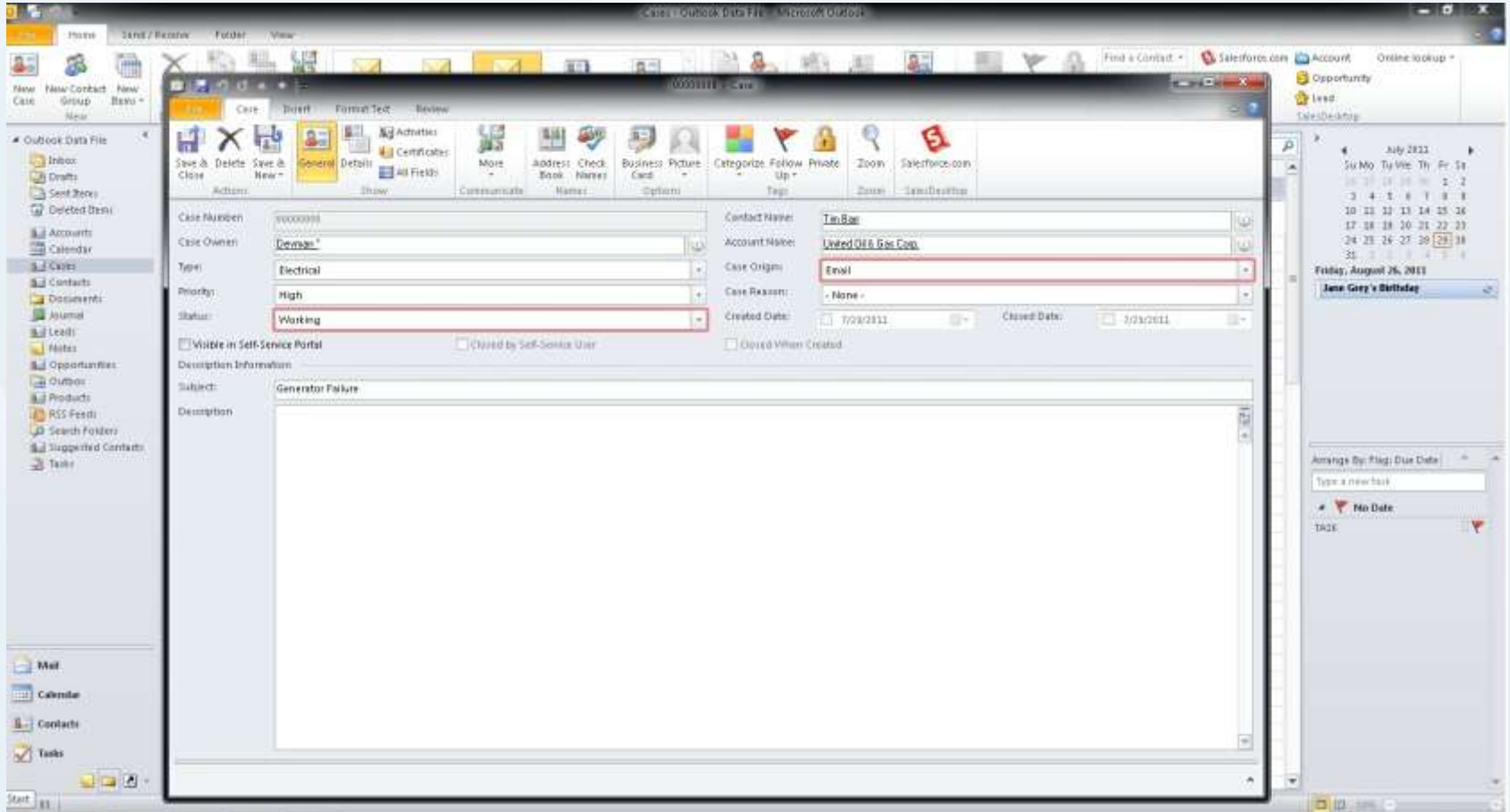
Salesforce Account Form in Outlook



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OutlookBridge-based integration: Salesforce CRM objects within Outlook



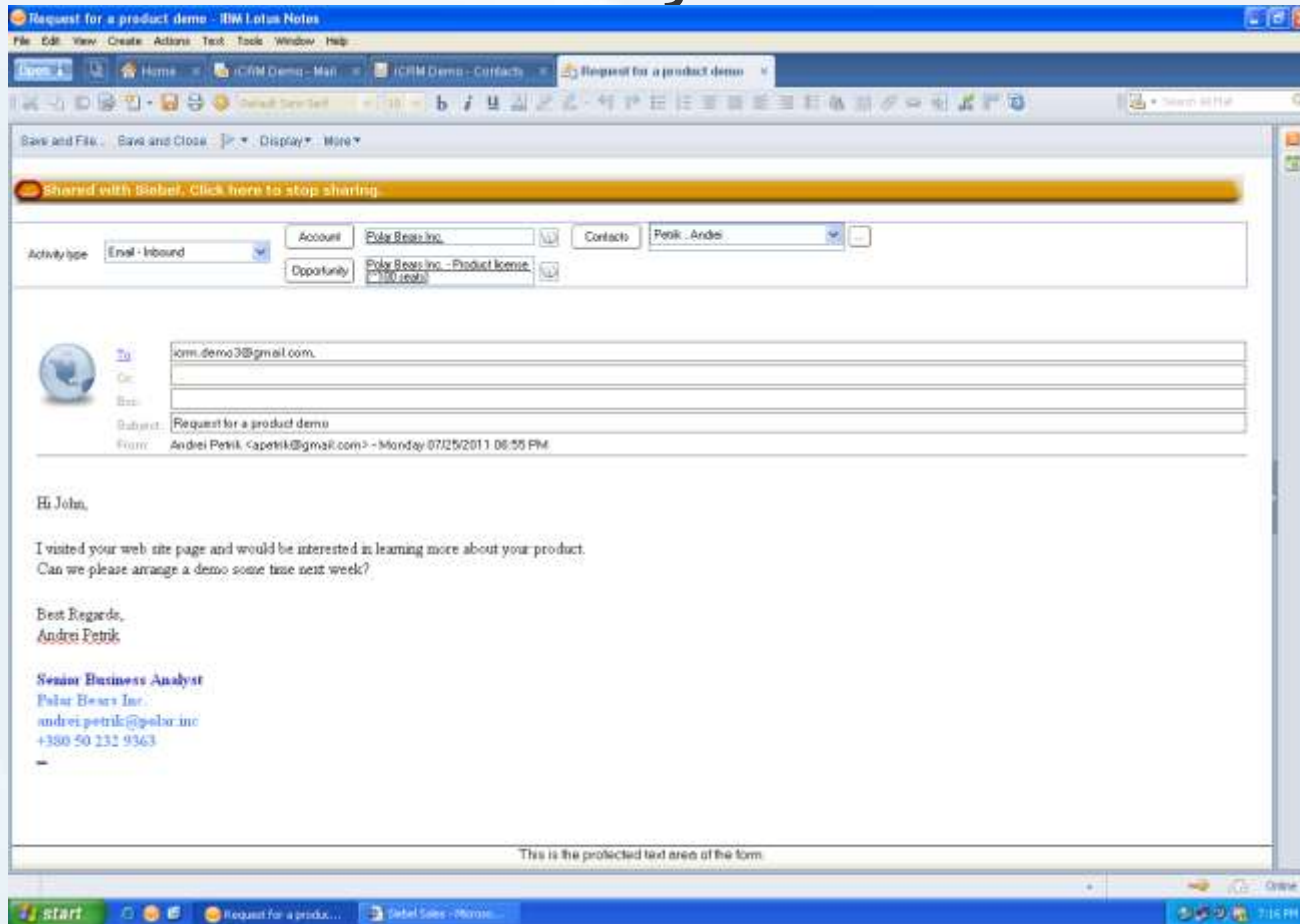
Salesforce Case Form in Outlook



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LotusBridge-based integration: Siebel CRM objects within Lotus



Shared With Siebel CRM Email Form



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LotusBridge-based integration: Siebel CRM objects within Lotus

The screenshot shows a Lotus Notes application window titled "Opportunity: Polar Bears Inc. - Product license (~100 seats) - IBM Lotus Notes". The window displays a form for "Siebel Business information for Opportunity".

Opportunity Name: Polar Bears Inc. - Product license (~100 seats)

Account: Polar Bears Inc.

Sales Method: Default Sales Methodology

Sales Stage: 02 - Potential Lead

Lead Quality: 03 High

Committed: -

Revenue: \$ 20000.00

Revenue Type: Projected

Status: Pending

Close Date: 07/29/2011

Probability %: 10

Priority: -

Sales Team: Vic Taylor

Organization: Default Organization

Textboxes: -

Contacts:

Name	Email	Phone
Petrik, Andrei	andrei.petrik@polarinc	

Activities:

Start date	Due date	Description	Type
08/02/2011		Product demo for Polar Bears Inc.	Appointment
07/25/2011		Request for a product demo	Email - Inbound
07/25/2011		Re: Request for a product demo	Email - Outbound

Attachments:

Attachment Name	Size (in Bytes)	Modified
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Notes:

Created	Created By	Type	Description
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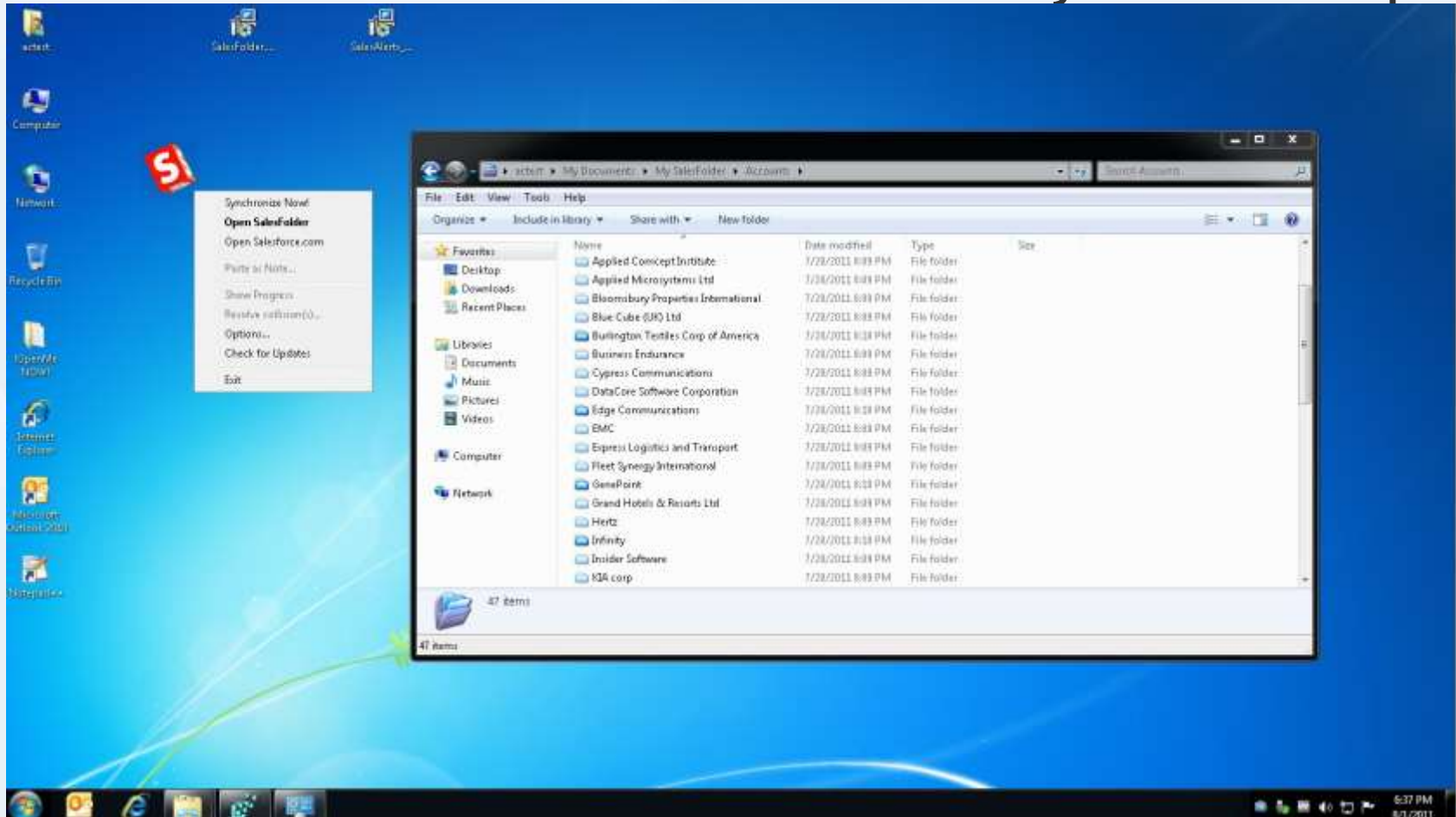
Siebel Opportunity Form in Lotus



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FolderBridge-based integration: Salesforce documents on your desktop



Salesforce Documents by Accounts



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Q&A



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Thank you!