

Replicon CRM Connector for Salesforce

Making the Sales to Services Handoff Seamless

Key Capabilities

- ▶ Pre-assign project managers in Salesforce
- ▶ Auto-create Replicon Projects
- ▶ Auto-create Replicon Clients
- ▶ Access Replicon details from Salesforce
- ▶ Update Replicon Project status when the deal closes

For many Professional Services Organizations, the handoff of a newly closed deal from a salesperson to the services delivery team can frequently be quite rocky. This is often due to the services delivery team not having enough visibility into the sales pipeline to be aware of upcoming new projects, let alone effectively forecast or plan for them.

The result is that the service delivery team is caught off-guard by the last minute, aggressive project deadline demands made by the sales team, and they then need to scramble to find the right resources to staff the project — especially when workers are already allocated to other projects. What's more, without enough lead time to plan and scope the project properly, it becomes difficult to provide reliable project cost estimates.

These issues impact the sales team, as well, because their credibility is tarnished when the project resources they promised the client are unavailable due to scheduling conflicts, or when they underestimate project costs.

What Professional Services Organizations need is a seamless way to integrate their data in Salesforce with Replicon to ensure streamlined, successful projects.

Replicon and Salesforce Join Forces to Bridge the Gap

The Replicon CRM Connector for Salesforce provides a seamless integration that ensures greater pipeline visibility from Salesforce within Replicon. This enables the services team to schedule

resources, plan projects more effectively, and deliver accurate project cost estimates and scoping to both the sales team and prospects.

The Replicon CRM Connector for Salesforce is a 100% cloud-based integration that helps organizations:

- ▶ **Plan for resources before closing the deal:** Projects in the pipeline are auto-created in Replicon from Salesforce before the deal closes. This means that project managers can start adding placeholder resources to ensure that the right staff is locked-in, and that resource planning across the organization is optimized.
- ▶ **Price projects more accurately:** With more time to build the team and plan the project tasks, the project managers can create more accurate cost estimates that lead to better pricing and bidding. This helps to ensure good margins, sets the right expectations with prospects, and helps avoid cost overruns due to underestimated project scope.
- ▶ **Improve forecasting precision:** More accurate forecasting of the sales pipeline will help both the sales and the services team manage their groups more effectively so they can react more quickly to changing dynamics.
- ▶ **Streamline the process:** By automating the hand-off between the sales and services teams, you eliminate unnecessary administrative tasks, and ensure better communication and accuracy between the two groups.

Replicon CRM Connector for Salesforce

Making the Sales to Services Handoff Seamless

About Replicon

Replicon is the leading provider of cloud-based time tracking software. Our award-winning solutions are used by more than 1.5 million people in over 7,800 organizations across 70 countries. We help customers to better manage workforce attendance, expenses, projects, professional services teams, and shared services resources.

Our diverse customer base — from start-ups to Fortune 500 companies — trusts Replicon to help reduce compliance risk, keep costs down, and provide greater insight into business performance. Clients include: FedEx, MetLife, New Zealand Transport Agency (NZTA), Novartis, Orbitz, and Xerox. Replicon is a global company with employees in Australia, Canada, India, the United Kingdom, and the United States.

Key Integration Capabilities

The Replicon CRM Connector for Salesforce seamlessly integrates Replicon and Salesforce to create a unified experience. From the moment a lead is first received, to the time the sales team hands off the closed deal to the services team, and straight through to project completion — the whole process runs smoothly and reliably.

Key capabilities include the ability to:

- ▶ **Pre-assign project managers in Salesforce:** As a sales opportunity reaches later stages, users can pre-assign the project manager from a drop-down list auto-synched from Replicon
- ▶ **Auto-create Replicon Projects:** The Replicon Project is automatically created in “tentative” status when the sales opportunity reaches a

specific completion percentage pre-defined by the organization

- ▶ **Auto-create Replicon Clients:** The Replicon Client is automatically created (if none exists) when the sales opportunity reaches a specific completion percentage pre-defined by the organization
- ▶ **Access Replicon details from Salesforce:** Links are added in Salesforce to provide seamless access to the Replicon Project and Client to ensure visibility into project milestones
- ▶ **Update Replicon Project status when the deal closes:** When the opportunity is closed or reaches 100% completion, the Replicon Project status is automatically updated to “in progress”

The screenshot displays the Replicon web application interface. At the top, there are navigation tabs for Team, Clients, Project Management, Billing, Reports, and Administration. Below this, there are filters for Projects, Programs, and Resources. A summary bar shows 'Projects active through: All Dates' with options for 'Select Range' and 'Custom Range'. A table lists project statistics: 27 All, 0 My Projects, 6 Tentative, 17 In-Progress, 4 Completed, 0 Deferred, 0 Cancelled, and 0 Archived. The main table lists projects with columns for Project Name, Status, Client, Project Manager, and Start Date. The first row is 'Acme - System Upgrade Project' with status 'Tentative', client 'Acme', project manager 'Wood, James', and start date 'Nov 25, 2013'. Below this, an 'Opportunity Detail' window is open, showing fields for Opportunity Owner (Robert Paskowitz), Opportunity Name (Acme - System Upgrade Project), Account Name (Acme), Type (Existing Business), Lead Source (Trade Show), and Probability (%) (91%). A blue arrow points from the project row in the table to the opportunity detail window.

The Replicon Project is automatically created in “tentative” status when the sales opportunity reaches a specific completion percentage pre-defined by the organization.