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.

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About Replicon

Replicon, the Time Intelligence™ company, has over 20 years of industry leadership and is pioneering a new approach to time management. Time Intelligence elevates time as a strategic asset within an organization, to improve operational productivity, performance, and profitability.

Replicon's Time Intelligence Platform offers solutions for global time and gross pay compliance, enterprise time management for ERP, professional services automation, and an SDK for continued development - expanding the company's award-winning portfolio of cloud-based products, including complete solution sets for client billing, project costing, and time and attendance.

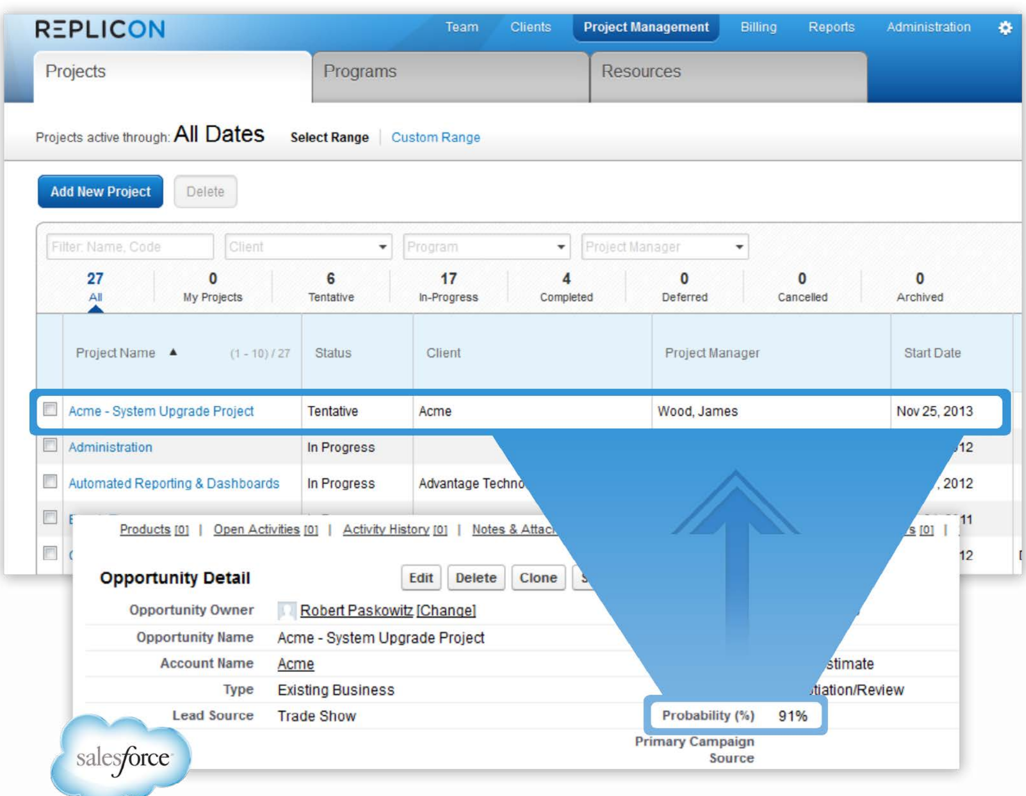
Replicon supports thousands of customers across 70 countries, with over 400 employees around the globe including the United States, Canada, India, Australia, and the United Kingdom.

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"



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