

Salesforce Sales Cloud Integration

Optimize Sales Performance™ is completely interoperable with Salesforce Sales Cloud, the popular platform for sales force automation and customer relationship management.

Application Integration

No special interface is required to deliver the integration between Salesforce Sales Cloud and Optimize Sales Performance, which saves time and money and helps eliminate data redundancies and errors. When Salesforce users log in, they automatically gain access to the full functionality of the Optimize Sales Performance portal application, which appears as a tab within Salesforce.

Efficiently Execute Sales Strategies

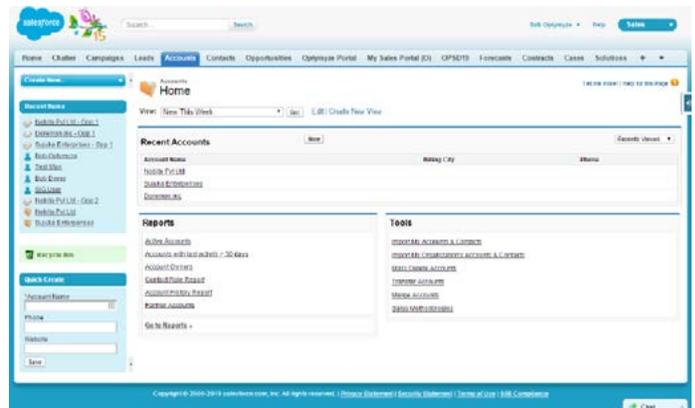
From Salesforce Sales Cloud, salespeople, sales managers, sales operations staff, and other joint Optimize Sales Performance users can quickly and easily:

- query data and maintain information from either application
- review sales compensation results and payments
- perform “what if” analyses that link sales pipeline data to projected sales compensation
- analyze performance using dashboards and interactive tools
- review territory, customer, and product forecasts
- manage, review, and communicate rewards and recognition
- review, adjust, and approve sales quotas
- create, evaluate, score, and approve (MBOs)
- manage exceptions and adjustments
- manage segmentation and targeting
- manage territory, account, geographic, and other alignments
- review call and activity plans
- conduct performance reviews
- do skills assessments
- enter, research, and resolve inquiries and disputes
- manage a wide range of sales workflow processes

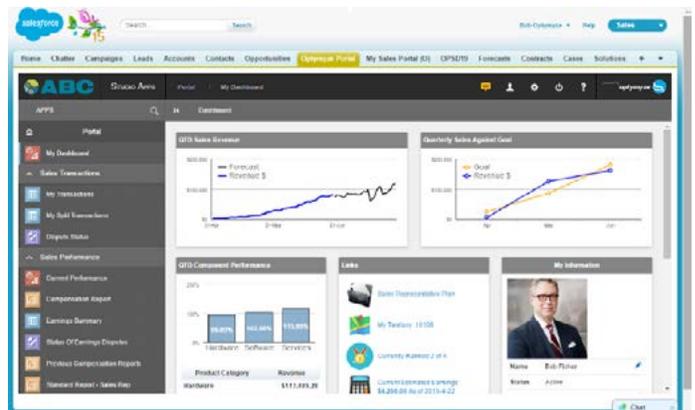
Data Integration

Fully integrated and native to the platform, the process to extract, transform, and load (ETL) Salesforce Sales Cloud data into Optimize applications is completely automated and requires no extra pre-processing or tools. The data repository architecture of Optimize Sales Analytics Platform™ has the flexibility and scalability to integrate, transform, validate, and cleanse all manner and volume of data.

Optimize Sales Performance provides single sign-on and seamless, automated integration with Salesforce Sales Cloud and other Salesforce solutions



Optimize tab view in Salesforce.com



View of summary dashboards about sales performance

The repository's data model is schema-independent, meaning that there are no constraints that require the writing of custom database code or the manipulation and transformation of data into a pre-specified, hardcoded data structure, which eliminates errors and delays caused by processing data using.

Optimize Sales Analytics and Data Management Platform

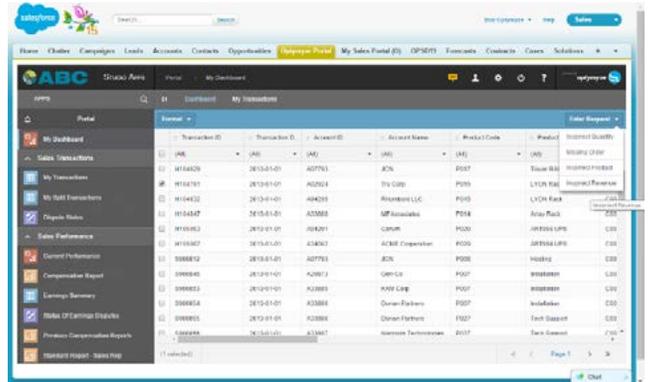
Our integrated sales analytics and data management platform enables business analysts to do things that would otherwise be too complex and take too long to do.

- define data integration sources directly linked to the Salesforce data warehouse without the need to create any data extracts
- define processes for loading and transforming data stored in any structure
- maintain and change the processes for loading data into the Optimize data repository as Salesforce data structures change
- review process logs that list errors and are automatically generated upon loading data
- define and maintain processes for validating and cleansing data to improve root causes of problems in the Salesforce data
- make manual adjustments, which are tracked by the system, to correct data problems and upstream data processes

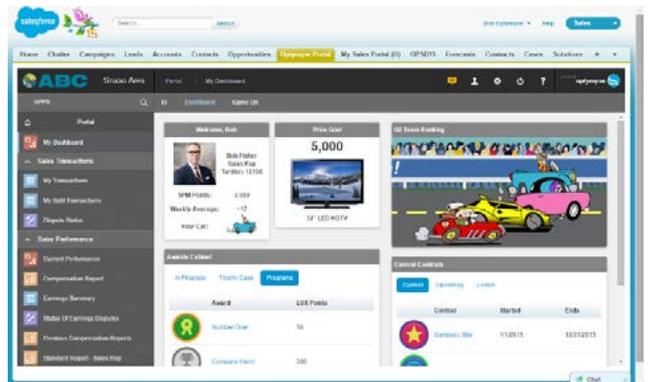
Benefits of Optimize Sales Analytics and Data Management Platform Interoperability with Salesforce

Because the Optimize data repository holds one of the cleanest sets of data, customers often use it as the primary source of data to feed other company systems for payment processing, additional reporting, and analysis. Optimize's seamless, automated approach to integration with Salesforce Sales Cloud applications and data also results in:

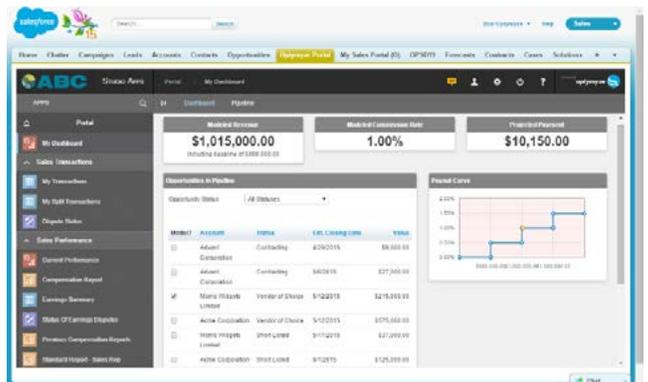
- improved accuracy through elimination of multiple data touch points and data exchanges
- real-time synchronization of data between Salesforce and other applications
- elimination of manual pre-processing and use of special plug-ins or third-party tools
- lower operational costs to create and maintain data ETL processes
- increased visibility into the impact of pipeline opportunities on individual performance, commissions, and earnings



Enter, research and resolve inquiries and disputes within Salesforce.com



Personal Salesforce.com view of sales contest and award status



Model variations of closing opportunities based on your compensation plan



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