The Only Truly

EFFICIENT C·R·M

for the 2020s—and the Future

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"In business, the idea of measuring what you are doing, picking the measurements that count like customer satisfaction and performance...you thrive on that."

— BILL GATES

Introduction

CRM and the Customer Experience

How important is a CRM in this digital age? How does it affect a company, the users, and most importantly the company experience? In this ebook, we'll have a look at all of these aspects, for the role of CRM has become more important than ever.

Processes

Today some C-level executives are very nervous as they feel the growing pains of the digital transformation that has been occurring on a steep curve for the last several decades. The only way to deal with that transformation is through technological processes—and these technological processes are the only way to run a company today.

It's gotten to the point now that if a process malfunctions, it can wreak major havoc with company operations. For example, if something goes wrong with an e-commerce application, a valuable transaction doesn't occur. In another area, data flow is interrupted and a crucial operation doesn't happen, and vital data is lost. Or, you're selling live in a video chat, reach the most important part of your pitch, and you lose your connection.

In sales that series of processes is, in fact, CRM. CRM applications have come from a technological "nice to have" up to the point where a company cannot live without one. I would say that CRM is the "operating system" of a company. It is the heart, it is the hub, because the "C" stands for "Customer" and without customers, a company doesn't exist.

How does your company remain aware of a customer and their details? CRM! You need to understand customer account information, contact data, what kind of activities have taken place with them, their assigned sales rep, calls, emails, leads, opportunities, and everything else that would comprise a 360-degree view of that customer.

Customers have come to expect a level of care and attention that can only be obtained through CRM. They become impatient if you're not instantly aware of their purchase history, preferences, and recommendations. They expect you to have a perfect profile of them, and you should. All of this makes up what today is referred to as the CX—"Customer eXperience." An effective CX is a holistic one. From that customer's buying journey, we can then create a personalized experience. This cannot be done without a CRM.

Of course, when you have a CRM armed with all this data, you have to use it. It's just like anything in life—many people have things in their houses or offices that they never use. With a CRM system, company staff need to actually interact with it. If that's going to happen, the CRM itself must possess spectacular ease of use, because salespeople should not be the only ones interacting with it. It isn't just one division or one department; it has to be every department. How else can you obtain a great experience for the customer—that all-important CX?

Training

When a CRM solution is not intuitive, it takes much longer to learn. A non-intuitive quality will also impact its everyday use; when salespeople or others in a company have trouble understanding an application, they will tend to shy away from it. That means that vital data may be entered incorrectly into CRM, or not be entered at all.

To get a CRM in broad use across a company, it must be easily learned, which is where ease of use comes in. Pipeliner CRM excels in this area, as it can be learned by a new user in hours, as compared to the weeks and sometimes even months of other CRM solutions. We have ensured ease of use and learning through our visual orientation, consistent across the product.

Our completely visual approach has been part of our user interface strategy from the beginning. This strategy extends to every screen created. When a user learns one screen, its similarity to others means that progressive screens can be rapidly understood.

Additionally, we've built learning right into the product, so that users have access to product information right at their fingertips. People don't all learn in the same way, so not only is this information in text and graphical form, but increasingly in video form as well. We also have tutorials, and a way to contact support if for some reason the user doesn't find what they're looking for.

Benefits and Requirements

Given that every business must have a CRM or find themselves out of business in the future, it now becomes important to select the right CRM. What CRM benefits does a company require?

These benefits must be examined in detail. Different stakeholders—management, finance, general users—have different requirements. For example, not everyone will need all customer details, but may require fast overviews through dashboards or reports. It's also true that requirements change, and so technology needs to change right along with them. Technological innovation, too, can drive change (introduce new benefits) and can affect what a company desires, needs and wants.

I am often asked why I have a "disproportionate" number of developers compared to marketing and sales personnel. Most SaaS businesses are generally the reverse, and weigh far more in favor of sales and marketing. I have followed the advice of educator and author Peter Drucker, who said that to have a competitive advantage you must create the future. That only happens with a healthy investment in R&D. I believe, in our case, it is the right approach. Today we have a fantastic product that is only getting better.

Let's fully explore what a CRM is, and isn't…and why we believe Pipeliner CRM is the only truly efficient CRM for the 2020s, and the future.

Nikolaus Kimla

CEO at Pipelinersales, Inc.

“The shoemaker makes a good shoe because he makes nothing else.”

— Ralph Waldo Emerson

Chapter 1

The Suite Versus Best-of-Breed

Let's now have a look at a very interesting conflict that has existed for some years now in the software industry, one which affects CRM a great deal: the "suite" versus best-of-breed. A suite is a group of products marketed as a total solution for a company, so that they need not turn to another vendor. Best-of-breed means that a company chooses the best possible product for each area—accounting, manufacturing, tech support, CRM and so on—with no attention paid to any one provider. They are all integrated through an API.

Today, we have applications being developed and released at a mad rate. Part of the reason can be seen in the number of programmers out there—just look at open source platform GitHub, which currently boasts a membership of 37 million programmers. With that kind of programming power, it's no surprise that applications are being developed in record numbers.

This sheer volume of applications only makes the software world more complex for companies in search of new solutions. Fortunately, with the advent of advanced APIs, companies can utilize these applications and embed them into corporate data flow.

A Single Developer

One misconception that I see today is that a single developer can develop multiple different applications that will all excel in their specific areas.

All the way back in 1776, a book was published entitled *The Wealth of Nations*, written by Scottish economist Adam Smith. In this book, which formed the foundation of today's capitalist economics, Smith pointed out that even the manufacture of one single product requires different workers with different roles. He wrote that the business of pin-maker ("pins" being the word for "nails" at the time) is "divided into a number of branches, of which the greater part are likewise peculiar trades. One man draws out the wire, another straights it, a third cuts it, a fourth points it, a fifth grinds it at the top for receiving the head; to make the head requires two or three distinct operations; to put it on is a peculiar business, to whiten the pins is another; it is even a trade by itself to put them into the paper; and the important business of making a pin is, in this manner, divided into about eighteen distinct operations..."

The world today is far more complex than in the time of Adam Smith, and we can see how true his words ring just in the field of medicine. Going back 100 years, there were, for the most part, no medical "specialists." Most doctors were general practitioners and could treat a very wide range of illnesses.

Today, though, there is almost no such thing as a general practitioner. Just look into any hospital, and you'll see cardiologists, orthopedic specialists, oncologists, neurologists, and many others, all experts in their areas. While each of them has studied medicine, none of them will touch you if your issue isn't one in which they're expert.

In short, one person cannot be great at everything, and with today's complexity, I believe this is truer than ever. This is why I believe the best-of-breed approach is the right one, and that the "suite" approach is incorrect. With software, we're dealing with the precise handling of data, and its flow from one process to the next. Anything less than the best at each point is unacceptable.

Specialized Development

From the standpoint of a developer, a single development team could never, for example, jump from CRM, to a quoting app, to document management. If a product is going to be great and compete in the marketplace, just a single application requires highly detailed R&D and an expert programming skillset. Therefore developers should focus on what they can do best.

Another issue with the "suite" approach is this: how does a developer decide which products to include in a suite? Out of the dozens of different categories of software, how is it decided that a majority of customers will need this particular set of tools?

And yet another problem is communication with prospects for each of these different products. In reality, each product requires its own marketing message, collateral materials, and sales communications. For the most part, trying to blend them all into one communication results in a failure.

Best of Breed: Workflow and API

One claimed benefit made by suite developers is that a suite will have a standard user interface for all the applications in the suite. My argument against that claim is that, working through an API, you're going to have far superior applications, standard interface or no. And you'll only be using the applications you really need.

With best-of-breed workflow automation, when you do need an additional application, it's available. An example is my own Pipeliner CRM; we didn't try and program an included support ticketing system because very few of our customers use it. We can, however, connect with a great one (Zendesk) through the API, and display the Zendesk data right there within Pipeliner.

Great functionality will beat the suite approach's "convenience" every time. Let's face it—great functionality is what you're after to begin with. The best-of-breed application is easier to use, is more robust, and has superior features.

Concentration on a Single Task

A best-of-breed application has another advantage: it has been developed for a single purpose, and all of the development effort, including updates, has gone into it. An example is our own CRM. In one single year, we averaged one update per month, with the improvement of over 3,000 items—all and only for CRM. We never could have done that if we were a suite.

Constantly improved APIs have made the integration of such applications into workflows more possible than ever. At Pipeliner, we utilize the very latest API technology, including REST and GraphQL. Such technology makes it possible to tailor the precise flow of data through a company.

Pipeliner CRM: One Thing Done Well

At Pipeliner, we concentrate on what we do best: manage customer data. Any business, especially one that is scaling to new levels, no matter what else it might need, will have to manage data. Managing data is what we do. We do it visually, and we do it extremely well. We make it possible for companies to integrate other applications, such as support ticketing, with CRM. The data from the ticketing system, which is best-of-breed, can then be displayed within our CRM.

As an example of how they integrate, let's say that your company has prioritized your customers into levels A, B, C and D, with "A" being the most important. Let's say one of your "A" customers has a support ticket. The ticketing system will handle it, but through CRM the account manager of that account is informed that their "A" customer has a support ticket. It doesn't mean that the account manager will handle the support issue, but they'll at least be able to keep track of it to ensure it is resolved for the client.

It might happen, too, that when the customer spoke to support and that ticket was issued, the customer had a question about an upgrade. That information will be right there in CRM, and the account manager can reach out to the customer and offer their assistance concerning the upgrade. At the same time, tech support will be able to see through CRM that the account manager is in touch with the customer, and they can coordinate, if need be, on the technical issue. This is a live example of workflow automation using integrated best-of-breed applications.

There's no real need for suites any more—with today's APIs, you can integrate all the best possible software you can use. You end up with a "suite" of best-of-breed software that exactly fits your company's needs.

"Specialization and organization are the basis of human progress."

— Charlotte Perkins Gilman

Chapter 2

Best of Breed—It's a Matter of Strategy

As a developer, one problem with the "suite" approach is that you lose focus. I believe that focus is the core of everything, and focus is something possessed by a best-of-breed developer.

The Heuristic Approach

Since I'm going to use a word, "heuristic," that some readers might not be familiar with, I'd better define it. According to the Random House Unabridged Dictionary, the word means "pertaining to a trial and error method of problem-solving used when an algorithmic approach—a set of rules for solving a problem in a finite number of steps—is impractical."

An algorithm allows you to make discoveries that are known beforehand, whereas the heuristic approach allows you to make discoveries that are not yet known; the location of "moving targets."

Chess players have found a fundamental difference between the heuristic and algorithmic approaches. It is possible to play chess with an algorithmic approach, but there is no guarantee of winning. But the heuristic approach allows you to truly master a situation—and win.

The heuristic view is more of an evolutionary approach to strategy and programming. It is used in specialization, which is best-of-breed, and that specialization needs to be built into corporate strategy.

Strategic Errors

We know from history that when a company discovers an error in its strategy, it's usually too late. This is because of the fundamental difference between strategic management and operational, or day-to-day management. Operational management can make changes on the fly, but strategy is utilized over long periods, usually years. It cannot be changed overnight. A prime example is Kodak, who discovered that they should not have clung so tightly to the film model of photography in the face of the digital photography explosion.

At Pipeliner, we know this all too well. We made a strategic decision 10 years ago to utilize Adobe Air as our platform, because at the time there was no advanced web technology. There weren't as many code libraries and components you could take from, and not even as many programmers as we have now. It wasn't until HTML 5 became available that we were able to change this long-term strategy.

Temptation to Bundle

That temptation to create a "suite" approach can creep into a company strategy, and it shouldn't.

In the software industry, there is an unbelievable temptation to bundle everything. An example from my own industry is marketing and sales—a CRM bundled with a marketing automation application. The two areas are very obviously of equal importance, but does that mean they should be a single application?

This reminds me of an old story: who in a restaurant is more important, the chef or the server? The restaurant lives by the meal cooked by the chef. But what if they have terrible service? The customers will leave, and won't recommend the place. The answer is that they are of equal importance, but totally different.

It's the same with sales (CRM) and marketing. They have to work together, and there's no question that they must be in alignment. But like the chef and the server, while they must be in alignment, they're very different. Therefore it's a mistake to think that there should be one single application for both. There is even the opinion in some places that if they have a common GUI, they both work equally as well. Not true.

A better approach would be, what is the best application for each group? The flow of data, the processes, and the workflow between the two must be seamless. With APIs, we can do that today.

For ourselves, for Pipeliner CRM, we are here for sales enablement, period. We are not here to enable marketing, because marketing has a very different approach. I do believe that sales and marketing must be aligned—but they must be aligned on the data and process side, not on the functionality side. The functionality is very different. Marketing is all about the web site, social media, and getting leads. Sales is all about obtaining and keeping customers.

Competition

There is also very separate pressure from competition in each area. Let's say, for example, you're a CRM company and you've purchased another company's marketing tool. There are hundreds of other marketing tools out there. The question is, did those marketing competitors stop developing when you bought yours? No! They're going to continue to evolve their single approach. And because they're working on that single approach, they can program more efficiently than another company—say, yours—that is trying to program for multiple products.

The company trying to combine products has an additional problem: they must create an overall GUI for multiple products. They can't just buy a product and incorporate it—otherwise they would just have different products under the same ownership.

Suite Approach is a Dead End

With the advent of advanced APIs, today the suite approach is a total dead-end, both for developers and customers. Not only that, it's a wrong strategic decision for both.

Time will tell if I am right. I made another prediction 20 years ago: that open source software was the future. I made this prediction at a press conference at a famous cafe, Cafe Landtmann, in Vienna, and was told by the head of Microsoft Europe, at that same conference, that I was completely wrong. Of course we now know that Microsoft totally reversed that position, and in 2018 purchased GitHub, the biggest open-source platform in the world, for $7.5 billion.

The different applications within a suite can never be equal with their counterparts in the single-development, best-of-breed arena. It's just not possible, even if they develop a great GUI to encompass them all.

This brings us full circle back to what we discussed at the beginning of this chapter: focus. The lesson you learn from focus is efficiency. And from efficiency comes productivity, and that leads to long-term profitability.

> ***"With brilliant simplicity, it leads to the most stringent successful forms of specialization, often in niches, which may be small, but precisely for that reason are usually very profitable."***
>
> **— Unknown**

"Know what your customers want
most and what your company does best.
Focus on where those two meet."

— Kevin Stirtz

Chapter 3

The Only Truly Efficient CRM for the 2020s —and the Future

So far in this ebook, we've discussed the role of the customer experience, the battle between the "suite" approach, and the best-of-breed approach. Now we come to the specifics of the CRM application itself.

At Pipeliner CRM, we evolved something called the Product Philosophy Wheel, which describes our approach, and which I believe describes the future of technology:

In describing a CRM, we're focusing on two parts of the wheel (page 20), processes and technology (because we are describing CRM, the third part of the wheel—people—will be not addressed in this chapter).

Here I'll quote renowned management consultant and author Peter Drucker:

"Efficiency is doing things right,
while effectiveness is doing the right thing."

First, let's talk about why we at Pipeliner feel that our system is the most effective CRM for the 2020s.

Effectiveness and Efficiency

For an analogy, let's go back 100 years, and say we're out in the woods and want to build a cabin. To do so, we need to cut down a number of trees for lumber.

One tool for the job, and the most traditional one, would of course be an ax. That would be an effective tool. But even a little way into the 20th century, we find one that would be far more *efficient*—a chainsaw. Both tools would do the same job, but in the end the ax isn't the exact right tool. The chainsaw saves considerable time and effort over the ax.

Like the chainsaw in our example our tool is, first, the only really effective one for sales, and second, the most efficient one. Certainly, there may be many other CRM applications that could be effective in some way—but which would really be the most efficient? That would be remarkably easy to use and would rapidly onboard for salespeople and sales managers?

Technology

Part of the reason for Pipeliner's efficiency is the care we have taken with the technology behind it. For many years we developed on the Adobe Air platform, because it was the only platform at the time which allowed us to take our approach of Instant Dynamic Visualization. Back then, web technology did not possess libraries and components which would allow us to execute and implement features we felt were necessary, so salespeople could be both effective and efficient. It was more than 4 years before we finally had a web technology equal to Adobe Air, which allowed us to make the full transition to the Cloud. We now make use of the very latest technology, such as the AngularJS web application framework.

Cybernetic Principles

The methodology we have applied all the way through our development is cybernetics, the "science of simplification" which originated at MIT. In development, we examine each possible user group—the salesperson, the sales manager, and C-level executive—and work to make Pipeliner as simple as possible for each of them. The application of these principles resulted in *Instant Dynamic Visualization*.

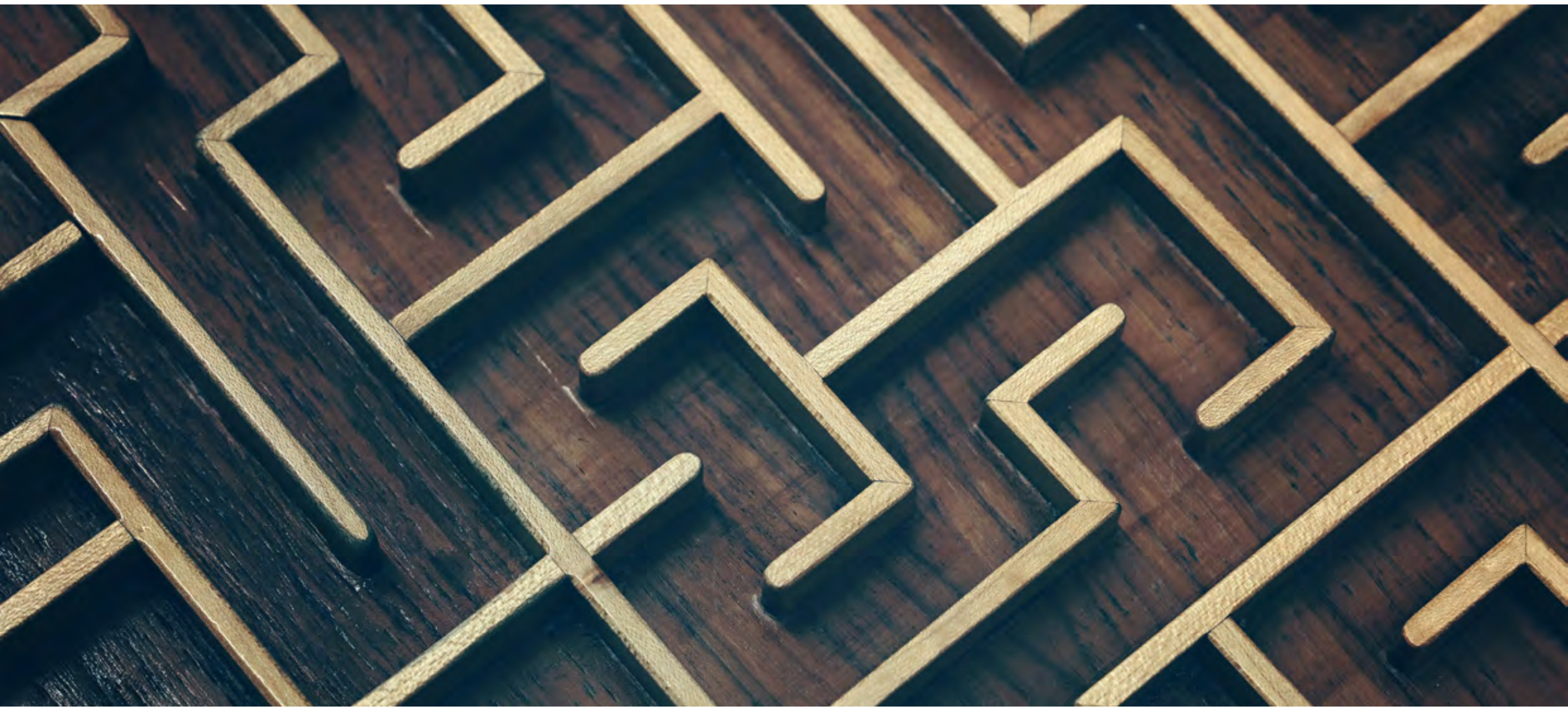
- **VISUAL:** Because a picture communicates so much faster than text, we evolved a completely visual CRM, which has resulted in the fastest adoption and most enthusiastic reviews of any CRM on the market.

- **DYNAMIC:** But it wasn't enough just to make it visual—it also had to be dynamic, because the world, especially the business world, is constantly changing, as is the data within it. CRM has to be able to totally keep up and change also, as CRM is the principal tool used in dealing with customers.

- **INSTANT:** The "instant" part is about time, as there needs to be little to no latency when it comes to a CRM. Users need to have the latest data, in visual form, right now.

Setup and Onboarding

Setup must happen rapidly, too, as nobody has time for complex setup and weeks or months of onboarding. For that reason, we've also heavily invested in the back end to make it smooth for everyone. Our unique administration interface is one of our core differentiators, and reduces the time, cost and learning of CRM in the enterprise space. We've even made it so that no full-time CRM admin is required; any person with computer skills can learn to be an admin.



Only a few years back, the importing of data into a new CRM, and cleaning of that data, was problematic. Today technology makes that easy, as well. Additionally, you can now connect to your favorite applications through API, and flow that data back and forth. It's a totally different game.

Training

One fact that has not changed over the years is that users must be trained. The faster and easier they can be brought on board, the more they will actually use the CRM—which, after all, is the whole point. We have made learning CRM incredibly easy, with most users able to come up to speed in a matter of hours, instead of days or weeks.

We do realize that in some respects, the training never ends because we're constantly upgrading the product. For that reason, we have a bullhorn icon at the front of the product that will tell you what is new. Through our written and video materials, we also increase general understanding of the overall product so that new features and functionality are almost expected—they make sense. This makes learning even easier.

When it is required, our topnotch technical support is there to teach perhaps the 2 percent of functionality that might have not been communicated in the training.

Focus

Many CRM developers today are trying to concentrate on as many different features as possible, trying to capture all imaginable bells and whistles, industries and markets instead of remaining focused on what they might do best. As an example of focus, let's examine legendary automotive manufacturer Porsche. One of the best car engines on the road is one they have been working on and improving for years: the Porsche 3.5 liter engine. That is a true example of focus. On the more modern side, we'll see in the next few years who will win the focus on electric and hybrid automobiles.

In our case, we have focused on the most important aspects of CRM to make them as cost-effective and useful as possible for salespeople. Our CRM, while used by sales management, has been developed mainly for sales reps. If you provide a real benefit to salespeople, management will get what they want—the data for excellent reporting. Therefore we have the most flexible and easy-to-use report engine in our industry. Our focus is not to be the "end all" CRM for all industries. We have focused on B2B sales. The only real customization required is to use our templates for your particular business, and to adapt it to your individual sales process—all of which can be done in almost no time.

Processes

The revolution we are embracing deals with the future of automation. It deals with the slickness of putting processes in place and automating as much as possible—processes for sales, marketing, C-level executives, accounting, and all the rest. Human beings don't operate 24/7, are not free from failure, and take sick and vacation time off. Technology is none of those things, so the more we can automate, the further ahead we'll be. But we've reached the point that humans cannot live without technology any longer.

"Treat your business relationships like friendships (or potential friendships). Formality puts up walls, and walls don't foster good business relationships. No one is loyal to a wall… except the one in China."

— Steve Pavlina

Chapter 4

The Vital Science of Relationship Mapping

The crucial importance of mapping relationships became very evident to us early on in the development of Pipeliner CRM. This realization led to two totally unique CRM features: the Org Chart and Buying Center. There is a science behind relationship mapping, though, that emphasizes and highlights its importance.

Connections

Today the business world is very much like a biological organism: there are many interconnections. While a company traditionally is composed of a hierarchy, horizontal influences have become increasingly important. As Thomas Friedman described in his excellent book *The World Is Flat: A Brief History of the Twenty-first Century*, the World Wide Web has created a level global playing field.

Going back to our analogy of an organism, it becomes increasingly difficult to rate the importance of one organ over another. Which is more important: the heart? The brain? The lungs? The liver? Life would be pretty much impossible without all of these in corporation.

This trend is reflected on a micro-level within a company—influences are many times not seen in a hierarchy, but horizontally or even diagonally from elsewhere. It's not so much the hierarchy that is important, but the function, no matter where it is on the hierarchical ladder.

The visualizing of these interconnections is what we mean when we're talking about relationship mapping.

Visualization

With Pipeliner's Org Chart, we're showing the hierarchical relationships within a prospect company. That way salespeople can readily see who reports to whom, and where the decision points might be.

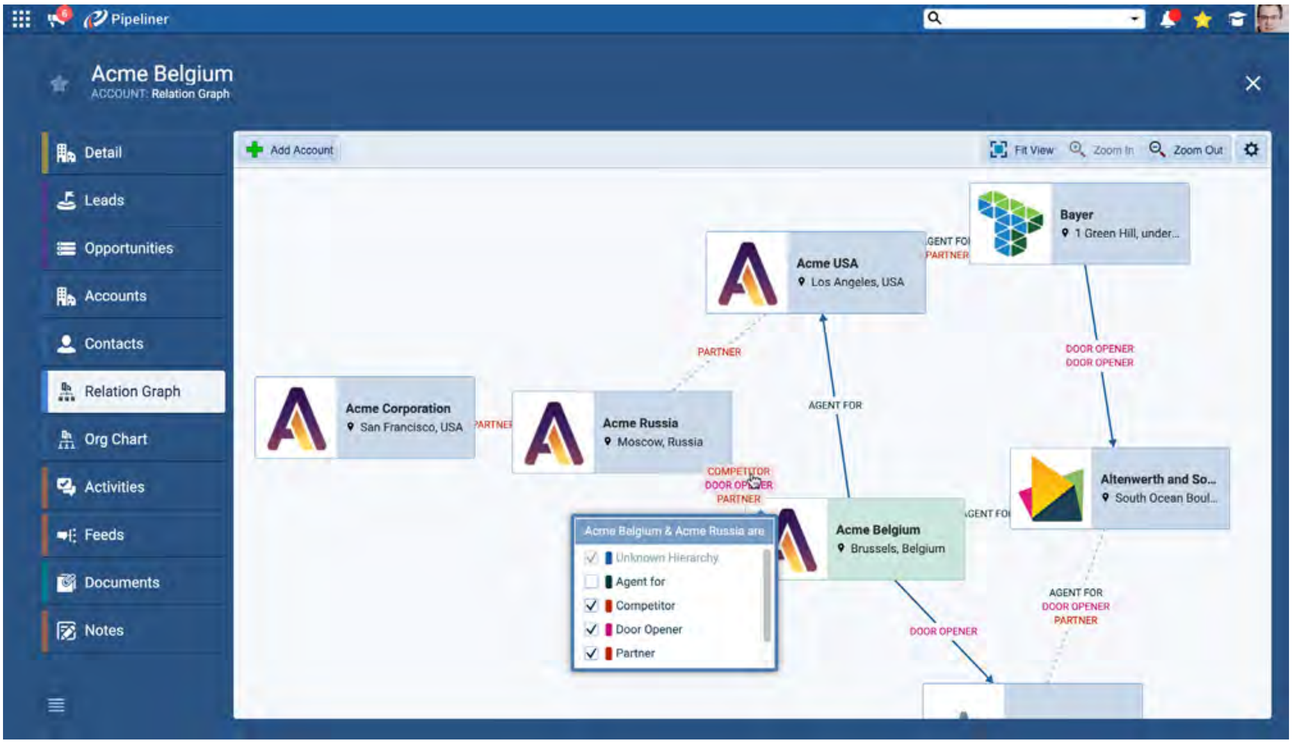
But because business is often not so strictly hierarchical, we also created a feature called the Buying Center. The Buying Center allows a salesperson or team to graphically show all the lines of influence on a deal, no matter where they come from. As we know, influence on a buying decision can even come from outside a company, as in the case of a consultant.

The Buying Center visually depicts everyone involved in a deal at the prospect end—the budget holder, the partners, the decision-makers, the naysayers and the supporters. It can be edited as needed, so that you can have a very precise overview of an opportunity.

The Tangible and Intangible

Relationship mapping clearly demonstrates the rising importance of the intangible, as opposed to the tangible. Throughout history, there has been a focus mainly on the tangible items, such as assets, liquidity, and capital. Traditionally the planning and the use of capital was the most important thing; we were fighting for stakeholder value.

At Pipeliner we believe, however, that for the future, the real capital for a company lies in the area of the *intangible*. Intangible elements include ideas, strategy, know-how, innovation, employee motivation, and trust from the customer. These are all things that you cannot touch, look at, or count. Product innovation could be included, too—not the product itself, which is a tangible item, but the actual power of innovation.



Intangible things are generally regarded by human beings as far more important. In a drastic example, recently in the Los Angeles area, we had massive wildfires. Many homes were burned. But at the end of the day, we were all greatly relieved that those intangible things called lives were saved, despite the loss of tangible property.

The intangible elements are what are tracked by relationship mapping. Those intangible relationships are what will make or break an opportunity.

In my opinion, the real success of a person or company isn't measured by how much capital they have. It is measured by intangible action. Capital itself doesn't fundamentally change anything. You can certainly do something with tangible items; with a hammer, you can put a nail in a wall and hang a picture. But the decision to take that action, and even the decision of where to hang the picture, is intangible. It's the intangible that will make the tangible materialize.

As you can see, it is the intangible decisions and factors that will move and influence processes. The better than these intangible processes can be visualized, the better the tangible outcome. The better the tangible outcome, the better the results and financial gains.

Finding the Bottleneck

Another very important aspect of visual relationship mapping is the discovery of the prospect bottleneck for any opportunity—for there always is one. Let's look at a bottleneck from a different aspect, that of hydroelectric power. A hydroelectric dam is always placed on the narrowest possible part of a river, because that is where the water is moving the fastest. Hence, that is where the most electrical power will be generated. That's an example of a positive use of a bottleneck.

The bottleneck in a sales situation might be invisible. It might be that everyone you're selling to is in total agreement with the deal—but unbeknownst to you, they're all looking for final approval to someone who is the real decision-maker. What's very interesting is that person may not even have a meaningful title. But that person is the bottleneck. That's why relationship mapping is so vital. Without it, you'll likely miss your bottleneck opportunity.

Intangible Values in Relationship Mapping

As you can see, it's the intangible values that are today overtaking the tangible values. When you are able to help a customer, you create customer loyalty. Today, customer loyalty is everything, and it's probably the most valuable intangible element there is.

It is these intangible values that are shown through our visualization, in the relationship mapping of our Org Chart and Buying Center.

"It's not a faith in technology.
It's faith in people."

— Steve Jobs

Chapter 5

Striking the Balance Between Behavior and Technology

Technology has advanced to the point where humans and technology have a very symbiotic relationship—they increasingly rely on each other.

Of course, a large segment of society has become addicted to technology. The most obvious example is smartphones—wherever you go today people are staring at their phones. It's sometimes impossible to talk to someone because their attention is fixed on whatever they're texting, and they won't look you in the eye. If you go to a restaurant, you'll even see whole families with attention wrapped up in their phones and not talking to each other.

This goes back to when television—once referred to as the "idiot's lantern"—invaded everyone's living room. Prior to that, families were talking to each other, playing games or reading. Suddenly everyone was all silently staring in the same direction, and not at a person.

But in terms of technical revolution, nothing is comparable to the smartphone. It has changed the lifestyle of almost every person. According to Statista, the current number of smartphone users in the world today is 3.5 billion, which is 45.12 percent—almost half—of the Earth's population. This is a blessing and a curse.

Technology Adoption

Smartphones are certainly one example of technology adoption. In other areas we see adoption of technology when there is some kind of instant gratification or benefit involved.

An example is the masses of retired people who use the internet to locate the cheapest prices on cruises. They also have become experts in finding the cheapest flights. Life expectancy is longer, now, and such skills are part of being retired.

Technology Adoption in Sales

What does technology mean from a sales perspective? We certainly have to examine this, because technology is such a driving force and nothing happens without it anymore.

In sales there has not been 100 percent adoption of technology. In fact, adoption of CRM—which is the technology we're talking about when it comes to sales—is a problem that CRM vendors still face. Why is this? My answer is that, just as with individuals in their private lives, "you use what you like." When someone likes a piece of technology, they'll use it. You don't have to convince them. I'm sure you've experienced this yourself.

Unfortunately this has not been thought through in designing the UI for CRM and other software systems. Developers just slap a bunch of features together, but don't make it cohesive, intuitive, or easy to use and understand. Conversely, we've developed Pipeliner CRM from the beginning to take these exact factors into account.

Behavior Change: Treatment Like Royalty

There is a behavior change that has happened throughout time, that has materialized in technology. This is a change that is absolutely necessary for salespeople and their companies.

Interestingly this behavior, going back 150 years or so, was only reserved for royalty and the upper class. An example is the cotton industry in my native country, Austria, which 150 years consisted of factories in which people worked 12 - 14 hours per day, 7 days a week, to service only the upper class and royalty. This held for other services as well.

Today, anyone who purchases any kind of service—for example from a restaurant or hotel—expects to be treated as only the upper class and royalty were treated 150 years ago. It's a very customer-centric approach. When customers are not treated this way, they tend not to return in the future. And companies will service anyone in this fashion, no matter how they appear or are dressed. In Los Angeles, it's not uncommon for the very wealthy to be attired in torn jeans and a T-shirt. And if they have the money, they'll get the service.

In other words, the buyer has the total power.

The Sales Attitude

Salespeople don't always understand this concept. In their private lives, salespeople are buyers themselves and expect this treatment. Yet they don't provide this same deference to their prospects and customers.

Another example from history are the plunderers, plundering being the opposite of trade. Kingdoms and empires would plunder other countries for their land and riches, rather than trade for them. Unfortunately some salespeople have carried a version of this attitude forward, and are pressuring the prospect so hard the prospect feels like they're being plundered.

Incorrect behavior is not something that salespeople can get away with for long—they're swimming against the tide, and the tide is going to drown them. In a sales situation, you must bring respect, wisdom and additional value to your buyer; otherwise, they'll go elsewhere. The buyer is going to go where they're treated the best, and where they get the most value.

I've often said that the currency of the future is recommendations, thanks to the speed of the internet. A salesperson behaving in a non-servicing way is not going to have a good recommendation, and will not have a job for long.

Supporting Technology

While technology has become a major part of our lives and business, technology cannot replace this all-important behavior—technology can only support it. As a note, Pipeliner does everything it can to fully support salespeople, who we believe are the wealth creators and peace producers of the world.

The right technology allows a sales manager to reinforce buyer-centric behavior. Technology, such as Pipeliner CRM, reveals all sales activity through totally visual analytics and data. Armed with this precise information, the sales manager can correctly coach salespeople.

A sales manager will want to watch two specific aspects of sales activity: creation of new business in the pipeline, and velocity of opportunity movement through the pipeline. Monitoring these aspects, the sales manager can view the mindset of the salesperson, and coach accordingly.

Precision technology allows a sales manager to put their finger on the weak points of their reps. Reps can then be supported in the required changes in behavior. If a salesperson won't change, they're dragging the rest of the team down to a degree, and they should probably be replaced. Sometimes you have to remove a limb to save the patient.

In a recent article I spoke about the difference between tangible and intangible elements, and the fact that the intangible factors today are more important. One of those factors is the salesperson's approach to the buyer. Technology greatly empowers that approach.

Technology has absorbed many of the tasks that in past years were manual, so that salespeople can concentrate on truly important activities. What's truly important? The trust being created, the relationships being built, the intimacy, the win-win being sought and attained.

And this is the balance between behavior and technology!

"A brand for a company is like a reputation for a person. You earn reputation by trying to do hard things well."

— Jeff Bezos

Chapter 6

What Makes Pipeliner CRM Truly Unique?

Pipeliner CRM departs considerably from the traditional concept of CRM application. In the beginning of this book, we made the statement that Pipeliner is the most efficient and, at the same time, unique CRM in the market. Why do we say that? Well, here are the precise reasons.

Focus On Salespeople

Right from the beginning, we focused on the salesperson. To start with, the salesperson is probably in the most underappreciated profession in the world. An example I use is that if someone had a choice of potential spouses that included a doctor, a lawyer or a salesperson, most parents would likely advocate strongly for the first two and against the third. Or, you're at a networking event, and there are several successful professionals there: a Chief Marketing Officer, a Chief Financial Officer, and a very successful salesperson. The common perception of that salesperson, despite their success, would be that they were somehow not really on par with the "C" levels. Being in sales means they probably didn't have the ability or skills to ascend to the executive level—despite the fact that there are many instances when a top salesperson can out-earn some executives.

Salespeople have, over the years, had somewhat of a tainted reputation. They're pushy. They're dishonest. They're only in it for the money, and the material things it can buy like cars, boats etc.

But the reality is that roughly 5 percent of the world's population is in a sales-related job. Despite some prognostications to the contrary, salespeople are more in-demand and more critical than ever. When you're shopping at the mall, who do you turn to for help? Salespeople. Or (my favorite example) when you go to an Apple store, and a helpful, friendly employee assists you—yes, that's a salesperson. My local Apple store employs almost 400 of them.

Despite being somewhat ignored, and cursed with bad reputations that most don't deserve, salespeople are vitally important to an economy. No company that deals with customers could exist without them. I consider the salesperson to be an "entrepreneur within the enterprise," and even coined a word to describe this phenomenon: *"salespreneur"*. And don't forget, that describes approximately 350 million salespeople around the world.

This is why I have a focus to help, support and change the public perception of salespeople.

The changing and elevating of the salesperson was our motivation for the creation of our online multimedia magazine, Salespop. Salespop now has over 1,000 contributors, with more contributing every day. This motivation is also why 14 universities (and counting) are working with us in formulating their sales education programs.

Pipeliner CRM

B2B salespeople are a subgroup of sales professionals globally, and number in the tens of millions. This is the group we have designed Pipeliner CRM for—and for this group of salespeople, Pipeliner is the only really efficient tool.

I used the analogy a short while back of the difference between using an ax and using a chainsaw to cut down timber—the chainsaw is far more efficient. Pipeliner CRM is the most efficient tool for sales, as the chainsaw is for felling trees. This is because Pipeliner CRM goes well beyond other tools.

What are the facts to back up such a bold statement? Here they are.

The Obvious Intuitive UI

Right from the beginning, we set out to empower the salesperson (and other users) with a very obvious, intuitive and visual UI. Easy to understand, easy to learn. The UI is the same from one end of Pipeliner to the other, so that there's never confusion as to how the application works.

A primary factor in the UI design, and one which makes it incredibly intuitive, is the fact that our navigation is always visible right within the UI frame, at the bottom. It remains visible at all times. We're the only CRM to do this—most others have navigation at the top, which means that as you use the CRM, the navigation disappears off the screen and it's easy to get lost.

In this way, Pipeliner CRM is very similar to the UI of an operating system. This is why we believe our CRM is the "operating system" for sales.

Multiple Views

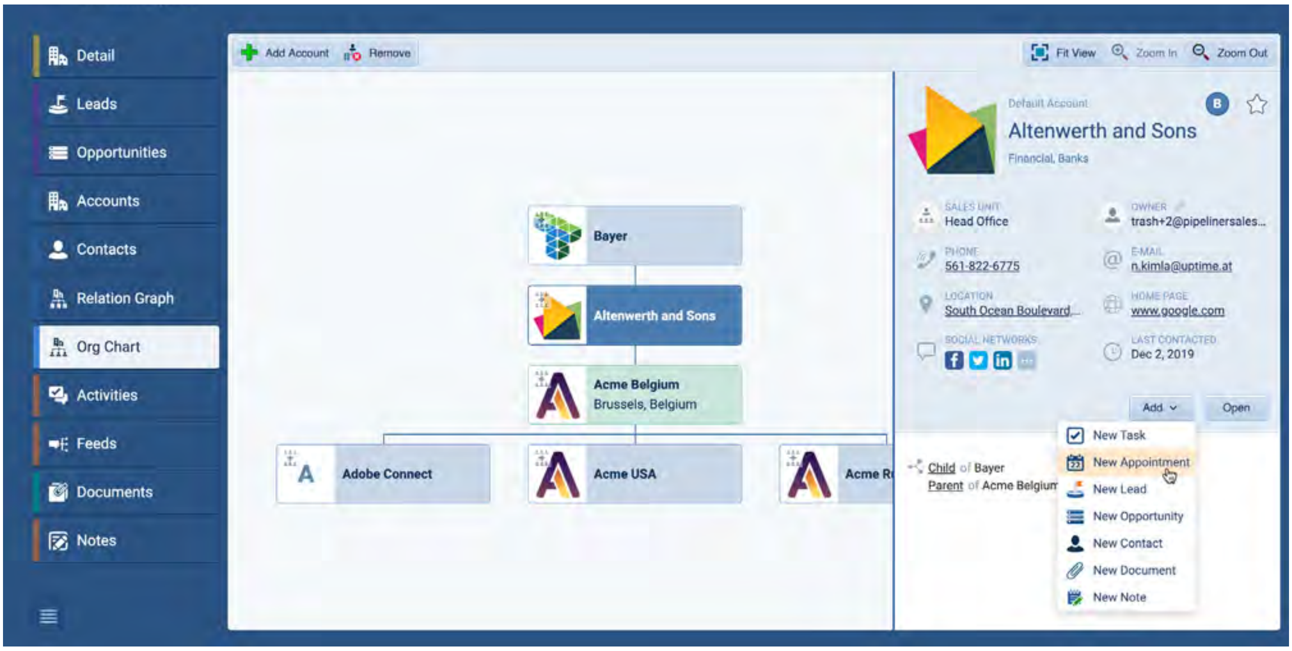
We are the only CRM that offers the user multiple ways of visualizing data. People may not only be different in backgrounds, languages, cultures—they can also be different in how they like to consume information. Therefore we provide a choice of views:

- Pipeline view
- List view
- Compact view
- Bubble Chart View
- Labels

Our Dynamic Target—another feature exclusive to Pipeliner CRM —also has 5 different ways with which you can view your target: unweighted, weighted, ranked, balanced, and real target. Plus, the target is always visible to the user.

Tangible and Intangible

In the last chapter, I spoke of the difference between the tangible and intangible. Tangible means the things we can see and feel. Intangible indicates our thoughts, goals, and decisions. The majority of human experience is intangible, and it is the intangible that guides our lives.



Sales is not only facts and figures. It is the strategy and decisions that guide the way through opportunities, which are intangible. Pipeliner CRM brings the intangible into a tangible form.

Sharing of Data and Best of Breed

Today it is impossible to run any kind of an automation system in which data is not easily shared. For that reason, Pipeliner CRM is programmed with two kinds of API: Rest API, and GraphQL API.

Not only do we offer the very latest in API to enable data sharing among applications, but we also have an Automation Hub, which contains the best of breed of all kinds of applications. These applications can be connected through our API.

The bottom line is that data flow between Pipeliner CRM and other applications must be seamless, so that the user can do their job efficiently.

Powerful data sharing is also utilized in our mobile version—the best mobile CRM available today—and our add-ons for Microsoft and Google products.

Ease of Use

While "ease of use" is so often casually thrown about that it has almost lost its meaning, it is an incredibly important factor for CRM. That is why we have made it a top priority in our development.

When a CRM is easy to use, that means salespeople actually enter the data vital to running sales and the company. That also means that everyone else in the company—C-level, management and others—will have access to that vital data and it will always be available.

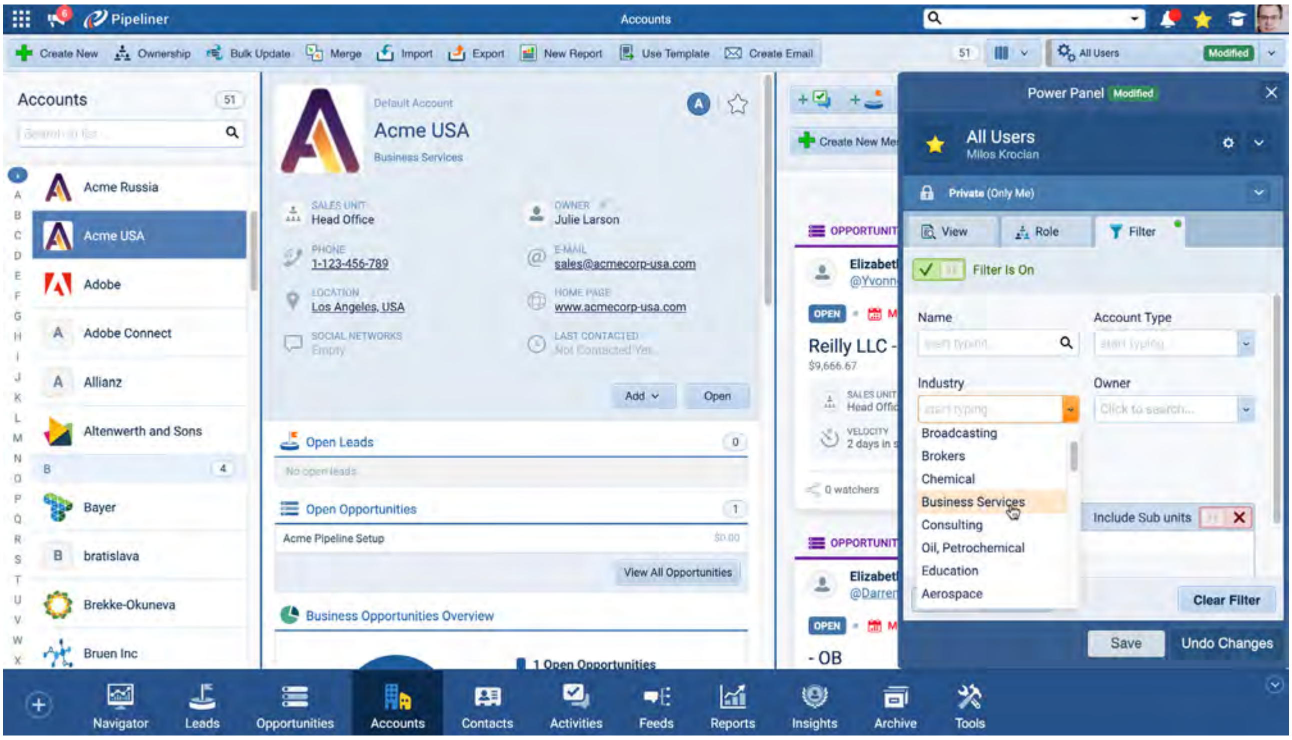
Ease of use is enabled in several ways:

- **DATA MIGRATION.** The critically important exporting and migration of data can be performed in Pipeliner with just a few clicks. Our bulk update means that updating the database can also happen rapidly, saving hours of work.

  Today there are so many forms of data out there that data entry is no longer such a major task. For example, if people are leaving business cards with you at a trade show, our mobile application business card scanner means you don't have to enter all that data. Data can even be entered verbally, through speech-to-text.

- **MULTIPLE MEANS OF HELP.** Just like we provide multiple views of data, we also provide several methods of help, when the user needs it. There is a searchable knowledge base where any topic relating to CRM can be found. Through our online chat, questions can be quickly asked and answered. And if required, a support ticket can be generated that will be rapidly addressed.

- **POWER PANEL.** The power panel is, again, a totally unique feature in the CRM industry. The Power Panel allows you to create multiple profiles to instantly view and sort data. These profiles can be copied, pasted and renamed. They can also be shared with individuals or groups.



These profiles can contain multiple filters and roles, and different kinds of targets. The Power Panel is the primary example of Pipeliner's Instant Dynamic Visualization.

Profiles can be created for different positions in the company, so they can view the data in a format specific to their individual needs. You can even create one profile for a group of 50 people, for example, and simply share it with all of them.

Sales Methodology

There are many different sales methodologies out there, such as SPIN Selling, the Challenger Sale, Sandler Sales, and many others. Pipeliner CRM, right out of the box, can be implemented with any of them.

B2B Focus

As I said earlier, Pipeliner CRM is designed for process-driven companies with larger B2B sales teams.The product can certainly be used by a single user, but the beauty and utility of the system becomes much more apparent with larger sales teams.

It is with B2B sales teams that features such as our Dynamic Target become incredibly valuable. For example, let us say you're near the end of a sales period and would like to figure out realistically what deals will come in by the end of that period. You could eliminate sales from the first 2 sales process stages, because you know that sales in those stages won't make it in by the end of the period. This gives a realistic view of the sales goal, as well as commissions.

Manager View

Of course, a CRM is utilized by sales management in managing sales reps. A key difference between Pipeliner CRM and others is that, with Pipeliner, the manager is not viewing "hidden" information that the sales reps never see. The rep is able to view the exact information that the manager sees. The only difference is that the manager can see everyone's data, where the rep can only see their own.

Why do we do it this way? Because we believe that because the sales rep is responsible for their own sales, they need to have all the information relating to them available.

It is that responsibility that should motivate the sales rep. It is not the job, in my opinion, of the sales manager to motivate salespeople. It is the manager's job to coach, but not to motivate. In another field, if a basketball player comes to a game and is not motivated, they would likely be sent home. It is true for sales, too. If a salesperson wants to learn more and is already motivated by their own sense of responsibility, then by all means the sales manager should jump in and help with coaching.

Coaching cannot effectively be done with the automatic selection of data, such as with machine learning. It has to be done within a live, real world environment. Machine learning can certainly support salespeople, but it cannot possibly coach them in real life.

Other Uniquenesses Supporting Effectiveness

There are numerous other features that support the idea that Pipeliner is the most effective CRM on the market.

Another totally unique feature is the Appointment Planner. This feature automatically provides the time zone in which an appointment is scheduled; the most accurate information is available right there in CRM, eliminating scheduling errors and mishaps. This feature is automatically synchronized with the Calendar View.

Our AI-driven Navigator feature provides a visual display of suggested activities for any given day. It lets you know what opportunities should be focused on—for example, ones that are almost qualified enough to be moved to the next stage. It also displays leads that should be followed up. It shows your largest opportunity so that you can focus on that if need be. It even highlights any issues associated with your sales velocity.

Summary

At the very heart of our reasoning that Pipeliner CRM is the only effective and most efficient CRM for the 2020s and beyond is its powerful visualization. It is a tool that means no opportunity will slip through your fingers, greatly reducing risk for your sales team. Without sales, no company can exist, so sales need to be as empowered as possible.

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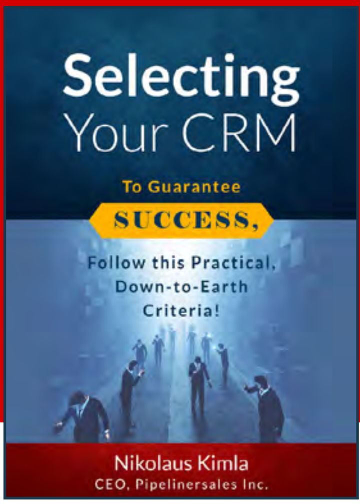

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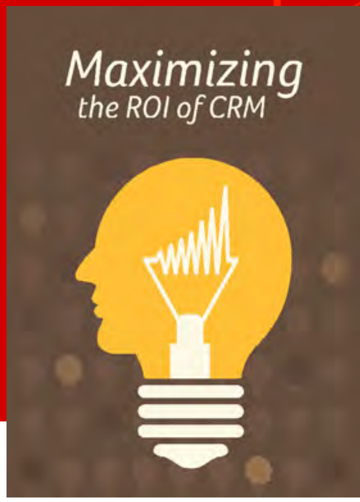

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A 30-year veteran of the computer industry, Nikolaus Kimla has founded and run several software companies. He and his company uptime iTechnology are the developers of World- Check, a risk intelligence platform eventually sold to Thomson Reuters for $530 million. He is the founder and CEO, developer and publisher of Pipeliner CRM, the first CRM application aimed squarely at actually empowering salespeople and sales management.

Also a prolific writer, Nikolaus has authored over 100 ebooks, articles and white papers addressing the subjects of sales management, leadership and sales itself.