Avolin

Pivotal Analytics

Making CRM Data Simple

Key Business Data at Your Fingertips

Data is only good if you can use it effectively. This sounds straightforward but today's data-driven companies understand the underlying importance in this message. The challenge is to take a seemingly infinite amount of marketing and customer information and translate it into meaningful Key Performance Indicators (KPIs). This enables managers and leaders to quickly gather insights and take action to improve performance, identify and address issues, and forecast for future success.

Designed for the non-technical user, Pivotal Analytics is self-directed – anyone in any role can quickly and easily tailor dashboards to their liking, without the need for IT support to do so, saving time and enhancing personalization. Avolin provides 3 different solutions for Pivotal customers:

- Pivotal Analytics for Sales
- Pivotal Analytics for Services
- Pivotal Analytics for Financial Services

Pivotal Analytics for Sales

Pivotal Analytics for Sales delivers focused sales dashboards out-of-the-box for Pivotal enterprise software users. Pivotal Analytics for Financial Services provides many of the same dashboards as the Sales solution but specifically designed for users working in private banking or wealth management. The dashboards that the two solutions have in common are the following:

- Sales Performance
- Sales Pipeline

- Sales Win/Loss
- Marketing Project Effectiveness
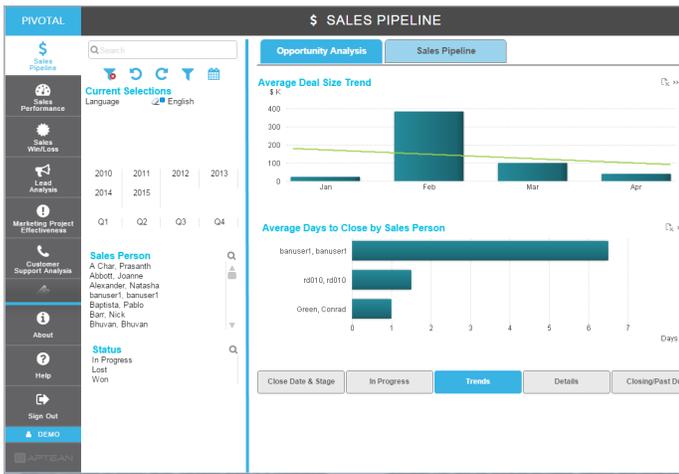- Lead Analysis

Sales Performance

The Sales Performance dashboard gives users a quick and easy way to see how they are performing against quota and forecasted sales. Users can see the number of accounts sold to alongside the value of opportunities closed, quota and the amount left to close to meet their sales objectives.

For private banking and wealth management users, advisors can see their current assets under management as well as assets under management over time. Opportunities closed as well as the number of households being managed is also displayed. Using these variables, your organization can analyze trends and quickly identify any issues.

Sales Pipeline

The Sales Pipeline dashboard provides details about opportunities identified which represent a potential sale. From the pipeline tables and charts, users can quickly see if they have enough leads coming in to meet their sales objectives and whether the team is targeting the right types of deals. Users can also quickly get a list of opportunities closing shortly and opportunities that are overdue so that follow-ups can be made. The beauty of the sales dashboard is the ability to use filters to define what data to display. With a few mouse clicks, a user can see the sales pipeline for a specific time period or user/advisor.

Sales Win/Loss

The Sales Win/Loss dashboard is all about analyzing trends for opportunities won or lost. Understanding the variables involved enables companies to determine the right focus for future deals including high-probability geographies or products. The win/loss tables and charts enable users to gain insight on the reasons behind winning or losing deals, whether there is a correlation between deal size and wins or losses and whether the win rate differs by product.
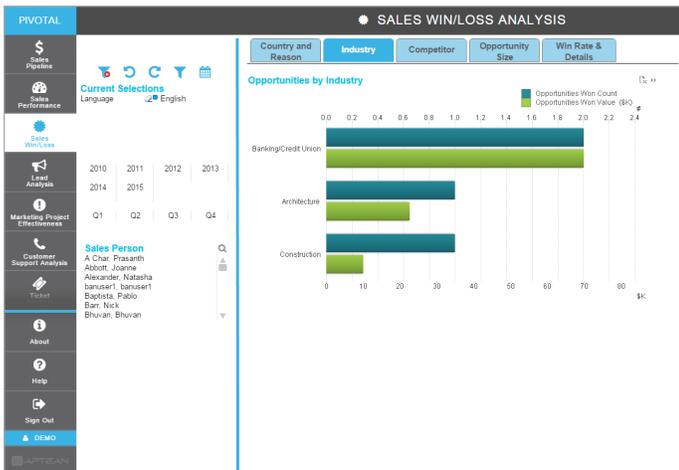
Marketing Project Effectiveness

Marketing project effectiveness tracks each tactical component of marketing campaigns which lead to sales. By identifying the effectiveness of each marketing project, a company can determine the right marketing mix for products going forward as well as determine return on marketing investment (ROMI) or other desired marketing effectiveness measures.

Lead Analysis

The Lead Analysis dashboard provides a clear way to look at the leads gathered by source, region, product interest, quality and details. This not only helps further determine marketing

project effectiveness as previously mentioned but also gives your organization targets for potential future marketing and opportunities.

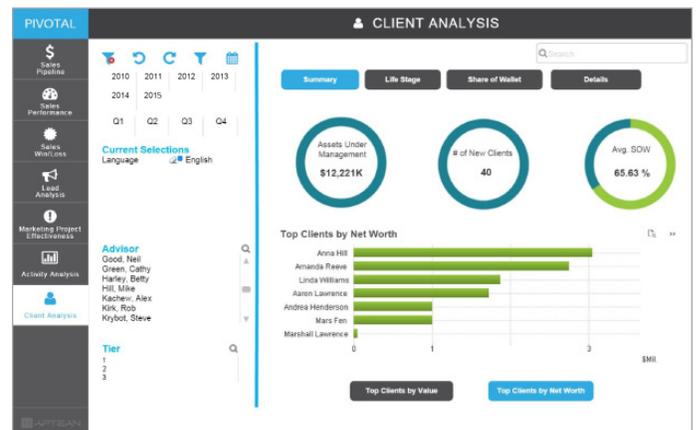# Pivotal Analytics for Financial Services

In addition to the Sales dashboards, Pivotal Analytics for Financial Services delivers private banking and wealth management specific dashboards to analyze clients and activities with clients.

Activity Analysis

The Activity Analysis dashboard tracks and displays customer-facing activities by call plans to ensure proper client follow through. These can be tracked by advisor, month or client. Total activities can also be tracked by client, advisor and product. Finally, overdue contacts tracks the details behind those contacts which are behind schedule, and the time-frame since last contact. This ensures proper contacting and client communication to optimize satisfaction and sales opportunities.

Client Analysis

The Client Analysis dashboard enables advisors to better understand their client base by displaying clients by net worth, total value, share of wallet, life stage and products. Advisors can use this information to segment their client base for new product offerings and promotions.


Pivotal Analytics for Services

Pivotal Analytics for Services gives you user-friendly tools for making your business data visual and easy to understand. This gives companies a faster, simpler way to evaluate current support operations as well as plan for future improvements.

Customer Support Analysis

Customer Support Analysis provides both a summary view and details outlining agent performance as it relates to first contact resolution, time to resolve tickets, number of cases closed, and combinations of the above that create monthly key performance indicators (KPIs). By analyzing this data, it is very easy to view and dive down into trends to determine action needed for future improvements or to assess agent and group performance.

Support Operations

The Support Operations dashboard serves as another level of detail outlining how quickly and how effectively support tickets are handled. As examples, support operations dashboards give a clear view into time to first contact and number of steps taken per ticket. These measures could help both set a baseline for measurement as well as outline anomalies which need further clarification or investigation.

Ticket Analysis

The Ticket Analysis dashboard gives users the ability to analyze support tickets, specifically ticket volume and open ticket details (by age, agents, severity and company). Looking at ticket volume trends and open and closed tickets gives a support organization an easy way to evaluate how well it processes tickets.

While this in itself may not tell the full story of how well the organization is supporting customers or how well its agents are doing, it provides an accurate and clear snapshot over a configurable time line. Coupled with reports like Open Tickets by Age/Agent/Severity, an organization can quickly determine how well it meets its pre-defined thresholds or where it needs to focus to bring its operation to an acceptable level. Organizations can also drill down on any outliers like months showing double the number of expected support tickets and look at the ticket details to understand the root cause.

An Extension to the Pivotal You Know and Love

Customers tell us that what they love about Pivotal CRM is that they can do anything with it. It is highly flexible to meet their exact business requirements. With Pivotal Analytics, we have ensured that users can tailor it to their exact needs. Custom fields and tables can be added to the data model enabling your organization to quickly adapt the solution to your unique measures and values.

Powered by QlikView

Pivotal Analytics is powered by the industry-leading QlikView platform, which has been deployed by more than 30,000 customers across the globe. Pivotal Analytics drives real decisions by providing actionable insight with the Associative Discovery capability.

Associative Discovery, the practice of exploring data to uncover key insights, is also shared among all users. With Associative Discovery, Pivotal Analytics can quickly dig into data from various data sources and see what's associated and what's not. You can select any data on the dashboards with a touch or click, including ranges or multiple selections. Associated data is identified by dynamic color-coding. This mechanism provides you the capability to quickly find associations that lead to insight, all of which you couldn't easily do with traditional Business Intelligence (BI).

Scalable

Pivotal Analytics provides faster performance with in-memory processing allowing for handling of and scaling for large data sets.

In addition, data association – relationships between existing and a new dataset – happens automatically. As the database scales, the capabilities delivered by the solution scales.

Conclusion

Pivotal Analytics for Sales, Financial Services and Services delivers the perfect combination of specialization, simplicity and actionable data. Delivered with business users and flexibility in mind, Pivotal Analytics will help you drive decisions with the right amount of data provided in the most meaningful and usable way.

Interested in learning more about Pivotal Analytics? Please contact us at **info@Avolin.com**.

Avolin

Avolin provides critical software solutions to enterprises around the world, specializing in Customer Relationship Management, Knowledge Management, IT Support and Supply Chain Management. Over 1,400 customers in more than 50 countries use our portfolio of solutions to help them provide outstanding customer service, keep their day-to-day operations running smoothly and make intelligent decisions based on relevant and real-time data. Our customers are at the center of everything we do and our singular goal is to deliver the right solutions for their industry-specific work flows helping to keep them at the forefront of their industries. For more information, visit **www.avolin.com.**