# infoteam
THE SALES PROCESS ARCHITECTS

Roadmap Software
Driving behavioral change through learning while you work technology

Roadmap Software is a cloud-based SaaS product which integrates the Infoteam sales methodology into salesforce.com and provides management information on the status of your opportunities. It integrates the familiar Sales Accelerators of the Opportunity Roadmap (e.g. Buying Center Analysis, Deal One-Pager, Sales Process Checklist), Account Roadmap (e.g. Health Status, Customer SWOT) and Appointment One-Pager into salesforce.com. Each of the 20 Sales Accelerators includes:
• An intuitive tool to apply the concept on an account/opportunity/customer meeting
• A Digital Coach with alerts and questions to trigger actions
• A self-learning tutorial video and a sales scribble
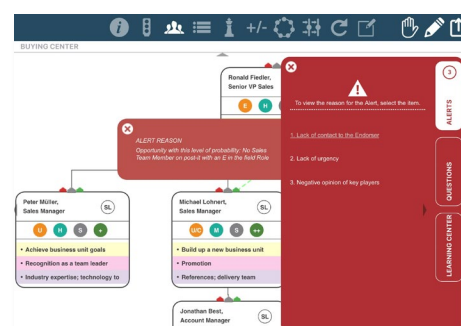• A Learning Center with Infographics and expert content
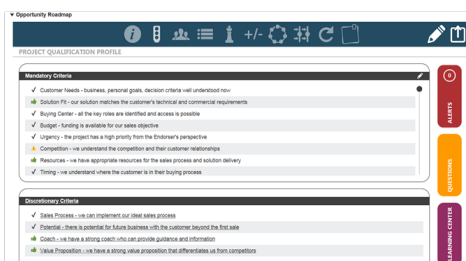
Tool to apply the concept on your deal

Self-learning tutorial video

Infographic describing best practice

Digital Coach (Alerts & questions to trigger actions)

User Functionality and Management Reporting
Users access the application through their CRM – only the relevant Accelerators for the type of business (Enterprise, SME, Partner Sale) are presented. Field coaching tips guide the user and Sales Process and Account Management Checklists suggest tasks to include in the action plan.

Alerts highlight potential issues and suggest mitigating actions, and Tutorials and Infographics refresh the user's understanding of each concept. Customer-facing concepts such as the Deal One-Pager, Mutually Agreed Action Plan and Account Roadmap can be exported to PowerPoint templates automatically. PDFs of the Account and Opportunity Roadmap can easily be created for pit-stops with your sales manager and opportunity team. A suite of management reports provides information about critical success factors in the sales process e.g. Buying Center roles not identified, alerts by opportunity, stage duration and when the opportunity was last pit-stopped. A comparison of win rate between opportunities with/without Roadmaps helps to measure the ROI of your sales performance improvement program.

System Administrator Functionality
The system administrator has access to additional functionality to customize the application and select the relevant Sales Accelerators for each Opportunity Type. The Sales Process Picklist, Project Qualification Profile, Mutually Agreed Action Plan, Deal One-Pager, Appointment Planning Repository and Field Coaching Tips are among the areas that can be fully customized and deployed to all users.

In Roadmap CRM the administrator can also configure the specific fields that are transferred between Account and Opportunity Roadmap and the back-end CRM system. Future releases will enable system administrators to customize the conditions under which alerts appears and add their own content to the Learning Center.

Benefits
• Better methodology adoption – resulting in more professional customer interactions, thorough qualification and a higher win rate
• Higher CRM usage – the integration of a powerful toolkit with reports adds value to your CRM system
• Effective pit-stops – managers use the Roadmaps for coaching critical deals and account planning sessions
• Zero IT-impact installation – the tool fits seamlessly into your Salesforce lay-out and data from previous releases is inherited automatically

Development and Support
Infoteam's Roadmap software is a web-hosted application developed and supported in cooperation with White Springs Ltd. White Springs is specialized in the integration of world-class sales methodologies into CRM systems. They provide installation, configuration and CRM administrator support, and ensure continued compatibility with future versions.