5 ADVANTAGES OF BEING ON PIVOTAL UX

PIVOTAL CRM
Pivotal UX is a groundbreaking release that empowers our customers to stay connected with their CRM data from anywhere. If you are looking for ways to increase sales productivity, this release is built for you.
1). Be connected to customers anywhere, anytime

Pivotal 6.5 gives you real-time access to customer and prospect information when and where you need it. Designed from the ground up with mobility in mind, Pivotal UX features a touch-friendly UI optimized for the mobile device of your choice. Use the UX Client to access critical account and contact information, quickly enter and update leads, track opportunities and send out emails that are saved in Pivotal.
2). Quicker & smarter interactions

With CRM at your fingertips, you can respond quickly to customer questions, access detailed data and update information on the go. You have access to information as it happens so you can be proactive on possible issues and easily stay updated on your accounts. All this leads to building and fostering stronger relationships with your customers.

30% of sales reps are able to do better follow ups with their customers using Mobile CRM.¹

3). Get insights through Analytics

With Pivotal 6.5 UX Client, you can have seamless access to Aptean Analytics for Sales. Aptean Analytics enables you to gain new insight within your opportunity pipeline, sales performance, and win/loss history. The data is provided via an intuitive interface and pre-built dashboards that not only provide high-level insights, but supports powerful exploration and drill-down capabilities into specific data.

Better Data = Better Insights

82% of sales reps feel that mobile access helps improve the quality of CRM data.²

Pivotal UX helps you access information faster. The enhanced dashboard capabilities provide a central location to access the information that is most important to you – like your current opportunities, activities for the day or list of key contacts.

Many time saving features have been built into the Sales application delivered with the UX Client. Simple lead entry forms help capture leads quickly. Sending standard communications, like thank you emails after a meeting, has been made easier using our built-in templates. Entering duplicate contacts is easily avoided; saving you from wasting time completing a form only to find out the contact already exists.

50% of reps using both smartphones and tablets to access their CRM said the mobile access improved their efficiency and productivity.³

Pivotal UX delivers seamless integration to the productivity tools you leverage on a daily basis. Our integration with Microsoft Exchange ensures that your calendars are in sync and you never miss a call or meeting. Our integration with Google Maps makes it easy to get to where you need to go, giving you the option to get directions directly from the Pivotal application or emailing yourself the address to use your phone’s GPS functionality.
5). Close more deals

As a sales person, having access to the latest customer information can create closer relationships and help close more deals. From reviewing recent activities to identifying new opportunities, Pivotal UX provides the flexibility you need to become more efficient. With more time on hand, you can now focus on finding more opportunities and closing more deals.

42 percent of sales reps say access to CRM data on mobile device facilitated “faster, more informed decision-making.” Of which 20% felt they closed more deals.4


Talk to your Account Manager today to see how you can get access to Pivotal UX.