The Connected Workforce: Social Collaboration + CRM Integration

Ken Lorenz - Riva CRM Integration & Special Guest!
Our Amazing Sponsors
We are in the “Age of the Customer”

CRM has become the hub of today’s business

Social selling and seamless integration between CRM and Social Collaboration platforms are transforming sales, service, and growth.

Companies invest in CRM to help their customer-facing agents “Connect the Dots”.
So what is the problem?

**CRM is not the "one view of the truth" – Why?**

- We don’t always live in our CRM.
- We are mobile and social.
- Our contacts and customer interactions are in email and our calendars
- We are lazy…
- The technology has not been that good
How do we solve the problem?

✓ Synchronize collaboration platforms and CRM

✓ Easy to use

✓ Scalable

✓ Flexible

✓ Connect the Dots - Surface Relationship Intelligence
Riva’s mandate since 2008

**Overcome the challenges** and limitations of client-side IBM Notes client

Deliver the world’s best **server-side integration** platform for CRM and email systems.

Increase CRM adoption and success through CRM integration that is **more reliable, more scalable, and more secure**.

Allow **all desktop and mobile users** to benefit from reliable CRM integration
How are we doing?

1200+ Customers  >90% Retention Rate  15 Major Banks  50+ Fortune 500’s
Riva’s special sauce:
Transparent, server-side integration!

Riva bridges the CRM integration gap for IBM Verse, SmartCloud Notes, and Domino.
Server-side sync – no plug-ins required

- IBM Connections Cloud
- IBM SmartCloud Notes
- IBM Notes and Domino
- IBM Verse
- IBM Notes 9, 8, 7, 6
- IBM Notes for Mac
- IBM Notes for Citrix
- IBM iNotes
- IBM Notes Traveler
- iPhone, iPad, Android,…
Riva extends the power of CRM and social

Windows desktops and laptops

Mac desktops and laptops

Virtual desktops
(Citrix, Terminal Services)

Web-based email clients
(iNotes, Office 365, Outlook Web App, GroupWise WebAccess)

IBM Notes Traveler devices
(iPad, iPhone, Android, BlackBerry, Windows Phone, Surface,…)
CRM System
Cloud or On-Premise

- Contacts
  - Contacts
  - Leads
  - Contact description

- Calendar
  - Appointments
  - Meetings
  - Recurring events
  - Phone calls

- Tasks
  - Custom fields
  - Custom objects
  - Custom categories

- EmailTracking to CRM
  - Track emails to CRM contacts, accounts, opportunities, cases, and custom objects.

IBM Notes
Cloud or On-Premise

- Address Book
  - Contacts
  - Leads
  - Contact notes

- Calendar
  - Appointments
  - Meetings
  - Recurring events
  - Phone calls

- To-Do’s
  - Custom fields
  - Custom objects
  - Custom categories

- Email Tracking to CRM
  - Inbound/outbound email
  - Email attachments
  - Sync email manually or automatically

- CRM-specific Content
  - CRM opportunities
  - CRM cases
  - And more!

- Folders / HTML Emails
  - CRM opportunities
  - CRM cases
  - And more!
Full support for IBM Verse, iNotes, Notes,...
View CRM contact info in Verse, iNotes,…
Riva syncs CRM calendars (month view)
Riva syncs CRM calendars (week view)
Riva syncs new Verse/Notes appointments to CRM
Riva syncs CRM calendars
Riva syncs CRM tasks
Riva syncs email to CRM contacts and accounts
Riva syncs email to CRM contacts and accounts
Riva syncs CRM opportunities
Riva syncs CRM opportunities
Riva converts emails to CRM opportunities
Riva converts emails to CRM opportunities
Riva syncs CRM cases
Riva converts emails to CRM cases
Riva syncs CRM cases
Connecting the Dots  - Riva Insight

Give me the insights I need to know with one click to relevance!
Need quote for 55 users of Riva for Notes
Abe Alexon to: demo az
Sent by: Administrator
Cc: aalexon, sgaganwal, soprabhakar

Thanks. This is a test.
What Happens Online in 60 Seconds?
Managing Content Shock in 2017

- 500 YouTube hours of video uploaded
- 149,513 emails sent
- 2.46 million Facebook posts
- 3.3 million Instagram photos uploaded
- 422,340 Google searches
- 142,777 WordPress posts
- 1,212 Twitter tweets
- 1,440 WhatsApp messages sent
- 29 million YouTube videos uploaded
- 20.8 million Twitter tweets
- 12.5 million WordPress posts
- 4.8 million Instagram photos uploaded
- 972 Google searches
- 347,222 WordPress posts
- 42,000 Twitter tweets
- 1,212 WhatsApp messages sent
- 29 million YouTube videos uploaded

2014
2015
2016
90% of the world's data was created in the last two years

80% of the world's data today is unstructured

1 in 2 business leaders don't have access to data they need

83% of CIOs cited BI and analytics as part of their visionary plan

54% of companies use analytics for competitive advantage
You need to personalize
To personalize you need cognitive insights

Cognitive computing is characterized by systems that can

Learn

Reason

Interact

Cognitive systems are not explicitly programmed.

IBM Watson
Meet Sia

AI & COGNITIVE FOR
PERSONALIZED MARKETING

by open topic
Delivered where teams work

Sia By Opentopic Thu, Jun 1, 8:32 AM

via Sia

Christian Jorg: Data about deutsche bank is being calculated. I will let you know as soon as it’s ready.

via Sia

Christian Jorg: Your data is ready. Sia Insight and Sia News.

via Sia

Can I get you similar insights or news on any other product, company, topic or person?
Clients
More information?

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- **Knowledge Base**: http://kb.rivacrmintegration.com
- **Riva for IBM Notes and Domino**: www.rivacrmintegration.com/integrations/ibm-notes/
Riva helps you Connect the Dots!