



NINTEXWORLDTOUR2019



Driving Sales & Marketing Success with Workflow & Document Automation

Paul Hsu

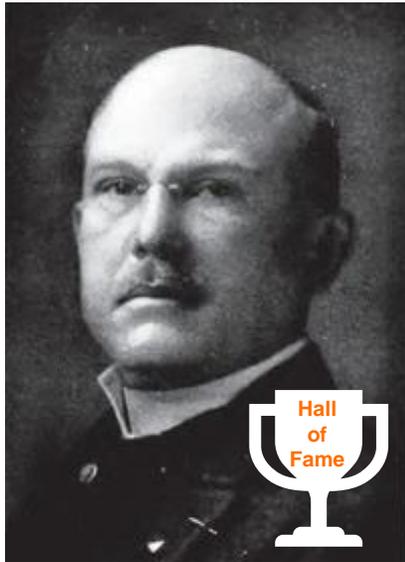
Senior Product Marketing Manager, Nintex

Tom Clark

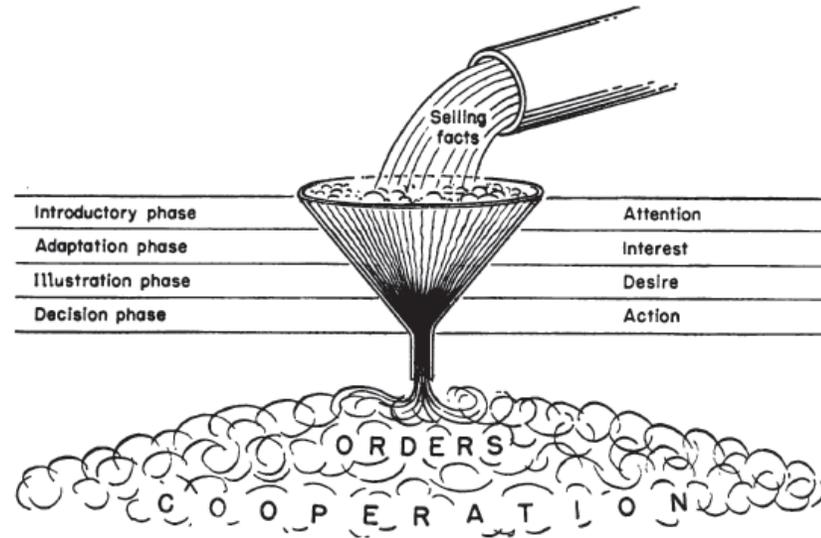
Technical Evangelist, Nintex



A Simpler Time for Sales and Marketing



Elias St. Elmo Lewis
Marketing Pioneer

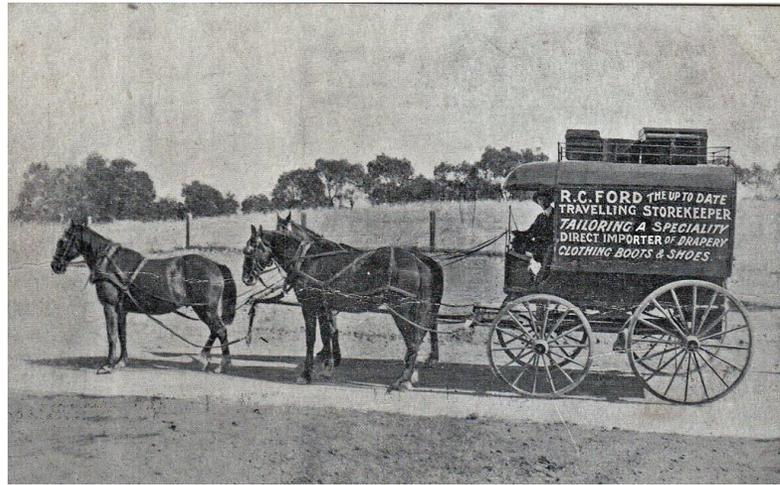


Attract Attention,
Maintain Interest

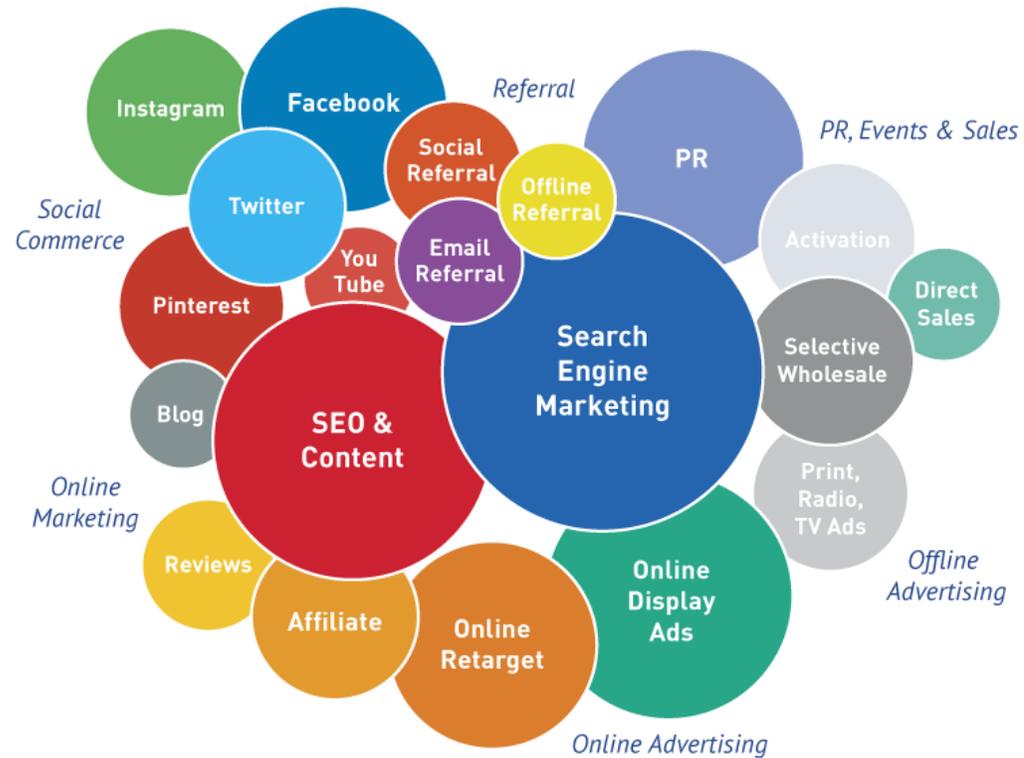


Burroughs Adding
Machine

Top of Funnel Tactics Were Sparse



Fast Forward 123 years...



Lewis' Concept Survived the Test of Time



Modern Marketing Funnel to Drive Sales ...
beintheknow.co



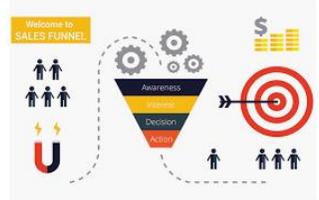
Modern Marketing Funnel to Drive Sales ...
beintheknow.co



The Traditional Sales Funnel is Broken ...
crazyegg.com



Modern Marketing Funnel to ...
beintheknow.co



How Aftermarket Sales Can Blossom in ...
dealermarketing.com



Leicestershire modern sales funnel ...
tyrrellcooper.com



sales funnel - The Data Dynasty ...
medium.com



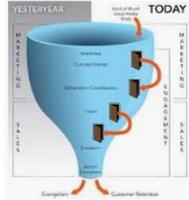
grow your Modern MSP sales funnel ...
info.csboxexcellence.com



The Digital Marketing Funnel: A Mo...
bluecorona.com



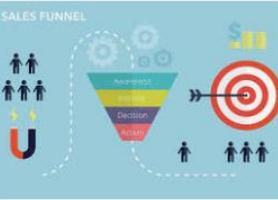
Sales Funnel VS Ideal Sales Funnels ...
thefusionbrand.com



Sales - The Evolving Sales Funnel ...
marketingprofs.com



Sales Funnel - SmartBox De...
smartboxdentalmarketing.com



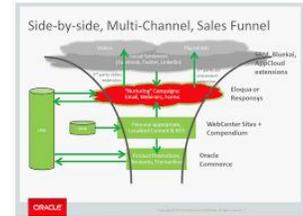
Build An Awesome Sales Funnel ...
nimble.com



How Unqualified Leads Bog Down Sales ...
industrialmarketingtoday.com



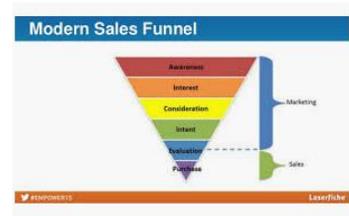
Sales funnel in Modern Marketing ...
scoop.it



How to plan for "Modern Marketing ...
team-oracle.com



conversion funnel « Modern Desi...
3dfunnel.wordpress.com



VAR102: Web Presence - Optimizing for ...
slideshare.net



Business 4 Steps Modern Stock Vector ...
shutterstock.com



Sales funnel infographic with color...
freepik.com



The Unbundling of the Sales Rep ...
medium.com



Conversion Funnel - Six Funnel Design ...



How to Build a Sales Funnel - B2B Model ...



Do You Know Your Marketing ABTs? | 2016 ...



Measuring Sales Velocity in Salesforce ...



Sales funnel infographic Ro...

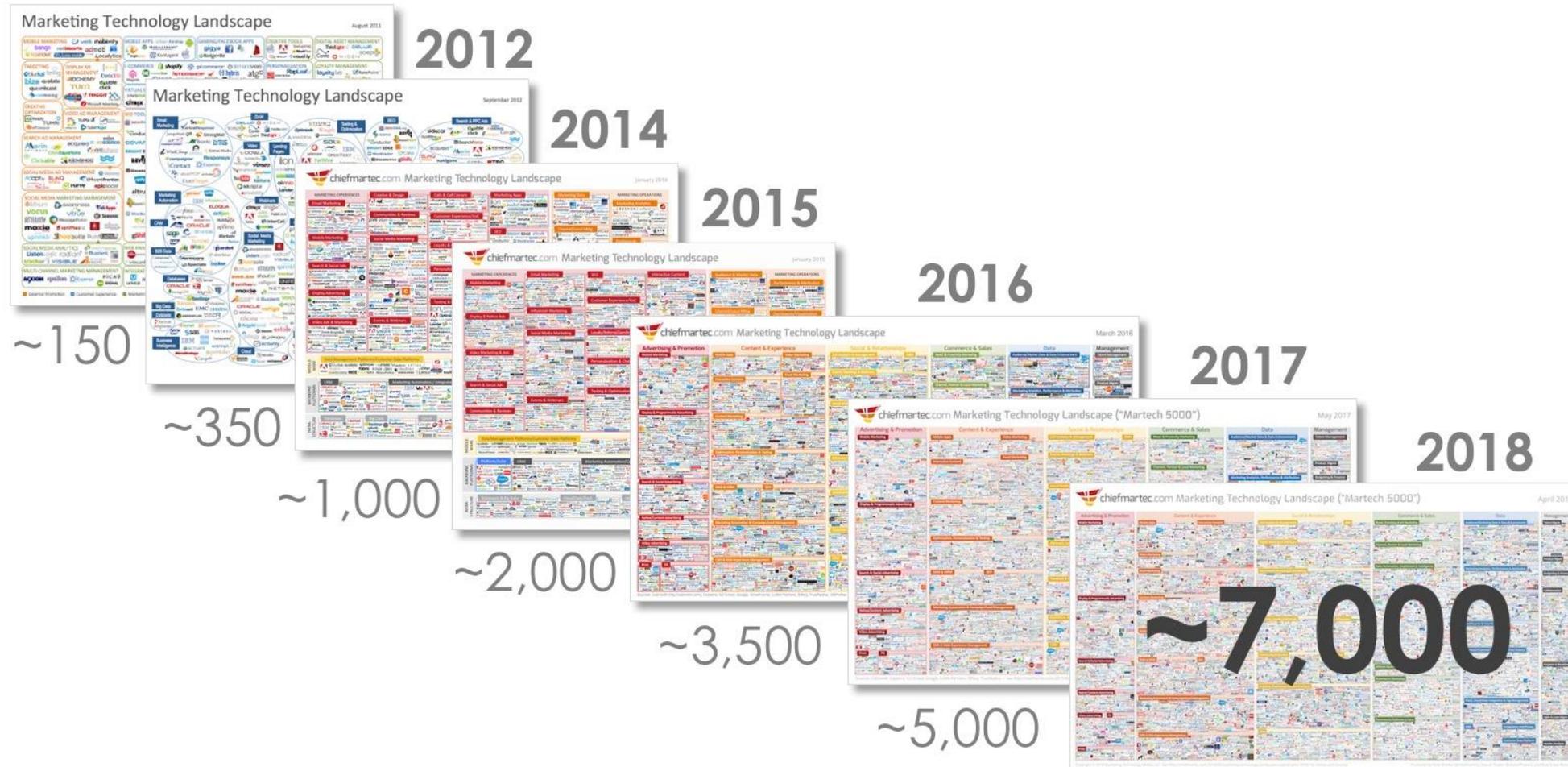


Sales Content Production | C7group ...



Business 4 Steps Modern Stock Vecto...

An Explosion of Sales and Marketing Technology



Advertising & Promotion

Grid of logos for Advertising & Promotion including Mobile Marketing, Display & Programmatic Advertising, Search & Social Advertising, Native/Content Advertising, Video Advertising, and Print.

Content & Experience

Grid of logos for Content & Experience including Mobile Apps, Video Marketing, Email Marketing, Content Marketing, Optimization, Personalization & Testing, DAM & CRM, Marketing Automation & Campaign/Lead Management, and CMS & Web Experience Management.

Social & Relationships

Grid of logos for Social & Relationships including Call Analytics & Management, Events, Meetings & Webinars, Social Media Marketing & Monitoring, Advocacy, Loyalty & Referrals, Influencers, Community & Reviews, Bots & Live Chat, and CRM.

Commerce & Sales

Grid of logos for Commerce & Sales including Retail, Proximity & IoT Marketing, Channel, Partner & Local Marketing, Affiliate Marketing & Management, Ecommerce Marketing, and Ecommerce Platforms & Carts.

Data

Grid of logos for Data including Audience/Marketing Data & Data Enhancement, Marketing Analytics, Performance & Attribution, Mobile & Web Analytics, Dashboards & Data Visualization, Business/Custom Intelligence & Data Science, iPaaS, Cloud/Data Integration & Tag Management, and Compliance and Privacy.

Management

Grid of logos for Management including Talent Mgmt, Product Mgmt, Budgeting & Finance, Collaboration, Agile & Lean Mgmt, and Vendor Analysis.

Automation

Workflow

Keys to Accelerating Sales and Marketing Success

Automation

Automate Document Creation



Equip teams to market and sell instead of manually creating and chasing paperwork

Expedite Approvals & Signature



Streamline document-centric processes with automated workflows and eSignatures

Workflow

Automate Marketing Activities

PLANNING & ANALYSIS

Campaign Development

Tame the complexity of cross-group coordination with sophisticated workflows designed to drive accountability and visibility.

Market Assessments

Enable analysts the ability to quickly access pertinent data points and share resulting findings with key stakeholders.

Vendor Administration

Simplify the process of contracting, onboarding, and managing vendor relationships.

Competitive Analysis

Distribute time-sensitive compete updates to stakeholders to expediate response plans and drive visibility.

CONTENT CREATION

Customer Evidence

Simplify the process of collecting and producing case studies, testimonials and more spanning internal and external audiences.

Press Releases

Manage the complex multi-approval process of creating press releases with ease while eliminating versioning headaches and increasing speed.

Creative Brief Assets

Quickly collect and triage creative asset creation requests to drive efficiency and visibility.

Social Media Posts

Transparently manage the collection and distribution of social media posts across stakeholders.

EXECUTION & DISTRIBUTION

Website Optimization and Updates

Streamline the updating of online assets with intelligent routing and approvals.

Streamlined Email Marketing Creative

Provide creative teams the ability to provide supporting assets without having direct access to marketing automation tools.

Field Marketing Events

Simplify the process of event content management and logistics to drive visibility and efficiency.

Client Communications

Seamlessly empower client-facing stakeholders to send timely communications within the tools they already use.

Expedite Sales Success

SHORTER DEAL CYCLES

Opportunity Management

Capture prospect data on any device, automate updates to CRM system, and set reminders for follow-up.

Discount Approvals

Request pricing discounts with just a few clicks, and automatically route for approval.

Contract Management

Leverage CRM data to auto-generate contracts, securely store and route to stakeholders for review, and obtain e-signatures.

Proposal Generation

Auto-populate on-brand proposals from within CRM system that include required inserts, then route and audit through review cycle.

HIGHER WIN RATES

Account Planning

Send emails to managers and assign tasks to reps when opportunities of pre-defined values are created without a plan.

Deal Support Requests

Create a customizable forms to request resources to support meetings, demos, etc., create tasks, then add to calendars.

Opportunity Coaching

Automatically schedule opportunity reviews with reps when certain conditions are met in accounts.

Skills Training

Schedule and automate regular skills training to reinforce best practices, product and pricing knowledge, etc.

DEEPER SALES INSIGHTS

Pipeline Reviews

Email reps and create tasks to ensure pipeline and opportunity forecasts are up to date, then schedule reviews.

Workflow Analysis

Measure the scope, effectiveness, and business impact of business processes automated with Nintex.

Win/Loss Alerts

Automatically monitor win/loss fields within CRM system and send alerts when fields are changed.

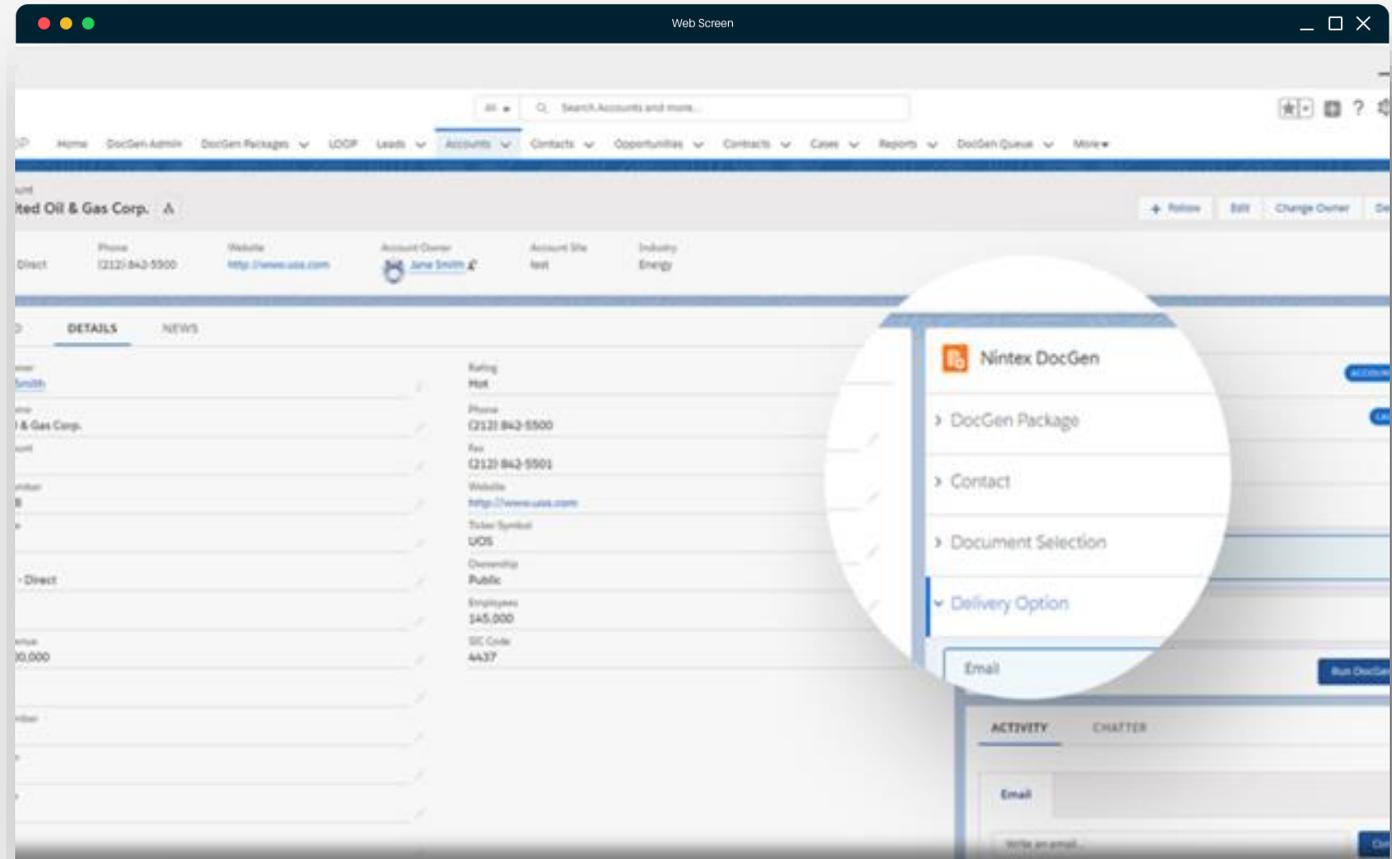
Management Reporting

Schedule and distribute sales performance reports to stakeholders throughout the organization.

Automate Document Creation

DocGen®

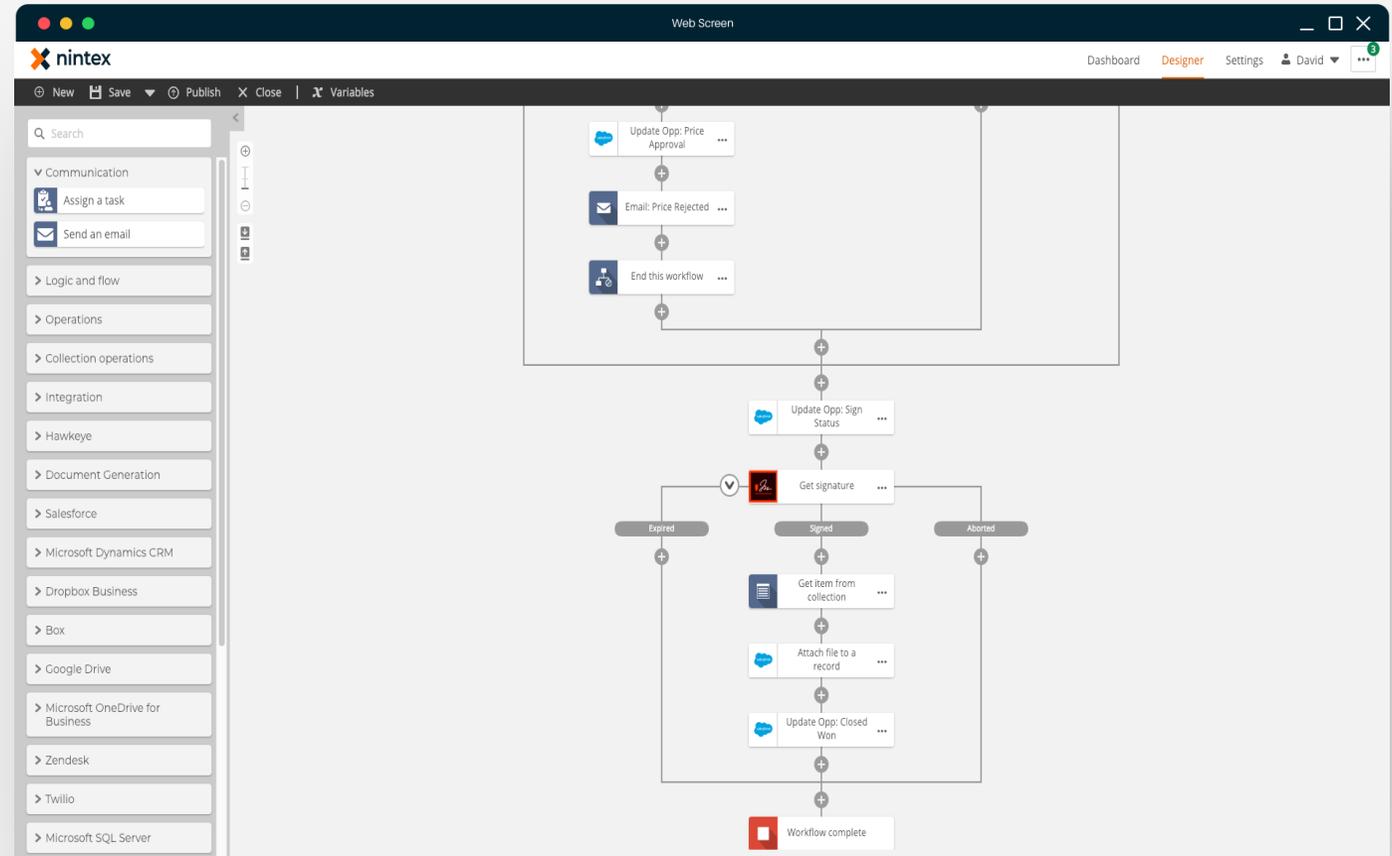
- Trigger data-driven document
- Activate CRM and other data without cutting and pasting
- Improve compliance with approved templates
- Deliver Word, PowerPoint, Excel, and PDF docs via efficient channels



Streamline Reviews and Approvals

Advanced Workflow

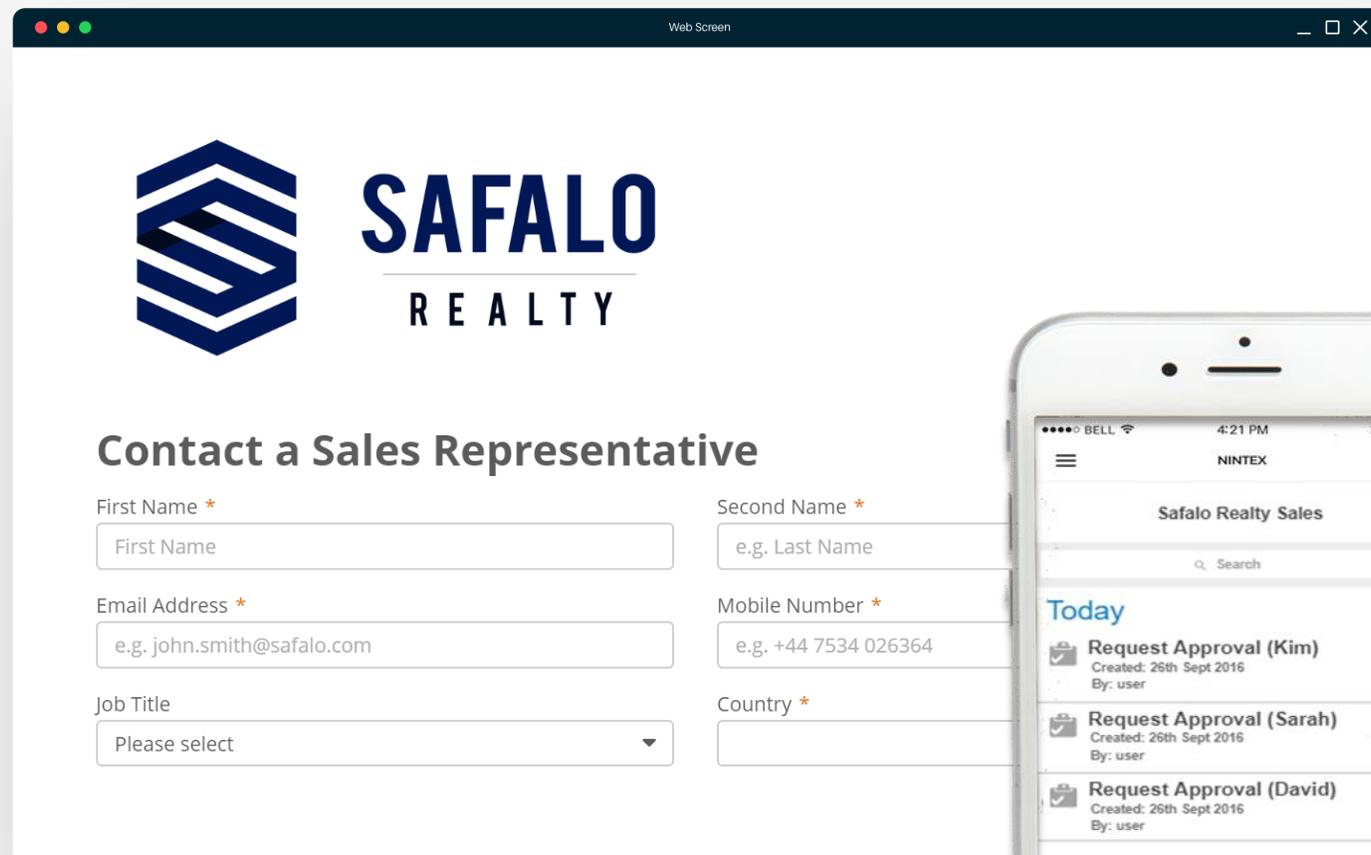
- Route documents for internal and external reviews and redlining
- Drag-and-drop functionality, no coding required
- Leverage eSignatures for faster approvals
- Trigger alerts, auto-assign tasks and reviews



Keep Processes Flowing

Nintex Forms and Mobile Apps

- Capture internally produced or customer provided data with forms
- Immediately activate form data to launch documents
- Access documents, forms or tasks from anywhere with mobile apps
- Work online or offline for immediate approvals



Web Screen

 **SAFALO**
REALTY

Contact a Sales Representative

First Name *

Second Name *

Email Address *

Mobile Number *

Job Title

Country *

Today

- Request Approval (Kim)
Created: 26th Sept 2016
By: user
- Request Approval (Sarah)
Created: 26th Sept 2016
By: user
- Request Approval (David)
Created: 26th Sept 2016
By: user

 **SAFALO**
REALTY





Nintex Demo

