

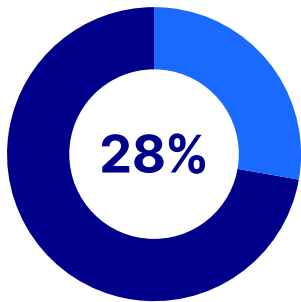
Close more deals with GenAI-powered SaaS content management

Best practices for smarter, faster sales processes



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Did you know?

Sales reps spend only 28% of their week actually selling.¹

Introduction

Companies must find ways to prioritize revenue-generating tasks to support growth objectives with limited resources. However, sales teams are bogged down with repetitive, manual tasks and endless searching through multiple applications, silos, and systems to find the information and insights to win new clients.

By combining SaaS content management with powerful content integrations, companies can bring important knowledge into focus, giving sales reps fast and reliable access to relevant customer information to get lead-to-order processes moving efficiently. By also integrating generative AI (GenAI) and automation tools, sellers can get more valuable time back to focus on closing deals.



QUICK TIP

Save storage costs and avoid errors, wasted time, and lost information by automating the lifecycle of mission-critical documents.

Improve information governance while providing easy access for teams and customers.

Ensure customer data is secure while meeting privacy requirements.

Integrate content management with your CRM to connect all customer touchpoints.

How to build a 360-degree customer view

Harness GenAI technology to automatically capture, classify and manage customer information.

Centralize customer information and interactions to improve sales and service collaboration.

Create a connected ecosystem through deep integrations with key systems and applications for sales teams, such as SAP®, Salesforce®, Microsoft®, and Google Workspace™.

¹ Salesforce, State of Sales, 5th Edition, 2022



Did you know?

Sales teams use an average of 10 tools to close deals.³



QUICK TIP

When integrating SaaS content management with your CRM, take time to evaluate how users will find the information they need. A GenAI-powered intelligent assistant that can search both integrated CRM data and customer documents is a huge time saver.

What's a 360-degree customer view?

A 360-degree customer view must include CRM data, but also related content. This consolidated view of customer information improves sales processes and drives deeper insights, ensuring sales reps can access *all* customer touchpoints and valuable knowledge they need to surface more opportunities and foster customer trust and connection.

What potential opportunities could your sellers be missing due to disconnected information?

By bringing siloed information into a central view through content integrations and leveraging an intelligent GenAI assistant to search and summarize customer data, sales reps can quickly access what they need to know about a customer and the products and services most relevant to them. Working with a content management platform that manages data across various channels means unlocking more customer insight.

1 Deliver a 360-degree view of customer information

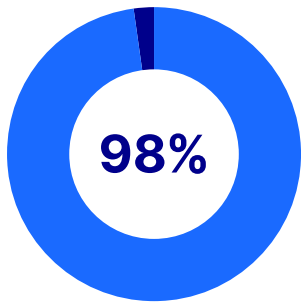
Siloed departments with siloed information cause disconnected customer experiences. Fifty-three percent of customers expect companies to anticipate their needs.² Yet with most sales teams using an average of 10 tools to close deals, the majority of customers face disconnected experiences across departments. This can be disastrous, affecting sales teams' ability to respond efficiently to customer inquiries and forge trusted relationships. Organizations must prevent frustration and lost sales by making sure sellers have access to a full view of customer information.

To empower sales teams, companies must provide an integrated infrastructure that drives productivity through better-connected people, content, and systems. That starts with a solution that delivers a 360-degree view of customer data and empowers sellers with a GenAI intelligent assistant to surface more customer insights, faster.



² Salesforce, State of the Connected Customer 6th Edition, 2023

³ Salesforce, State of Sales, 5th Edition, 2022



Did you know?

98% of technology buyers are interested in leveraging GenAI with a content management solution.⁴



QUICK TIP

Adopt AI-powered technology and analytical tools to uncover and address common oversights or risks within documents, such as sales contracts, which would usually go unnoticed.

2 Use AI automation to stay in the sales flow

Salespeople and customers are both looking to reduce repetitive and paper-based tasks wherever possible. Much of sales reps' average week is spent on non-selling tasks, such as manually entering customer information. Recent Salesforce data shows that sales reps spend only 28 percent of their week actually selling.⁵ Companies are beginning to adopt GenAI to automate many sales-related tasks and deliver wide-ranging insights so sales reps can spend more time closing deals.

5 ways companies win with automation

- Free up time spent searching multiple repositories with a single, central source of customer information.
- Request a summary of transactions and interactions to quickly understand the customer's experience.
- Automatically draft responses to customer inquiries based on an up-to-date understanding of the customer's history by integrating your CRM data with AI-powered SaaS content management.
- Easily gather product information to respond to customer requests and automatically generate summaries for better RFx responses and better deals.
- Seize more opportunities to upsell based on intelligent insights, such as customer history and trends.



⁴ Foundry Research sponsored by OpenText, MarketPulse Survey: SaaS Content Management Solutions, February 2024

⁵ Salesforce, State of Sales, 5th Edition, 2022

Did you know?

Sales and customer service teams, from call service agents to case workers, are only as good as the information they can access.



QUICK TIP

Consider employees' work environments and the technology available to them. Distributed sales and service agents are more likely to interact via a mobile device or tablet, significantly increasing the need for cloud-based solutions that support access anywhere, anytime, from any device.

3 Deliver insights faster through integrated content and GenAI

Eighty percent of customers say the experience a company provides is as important as its products and services.⁶ To deliver a responsive, personalized experience, top-performing sales are more likely to engage with customers across channels.⁷ To sell most effectively, sellers need reliable, secure access to information from any device or location.

Outdated, inconsistent, or conflicting customer information leads to interactions that could erode customer trust, such as incorrect product recommendations, missed upsell opportunities, or extended delivery times.

Existing customers can also be a vital source of new revenue opportunities. Sales teams need access to complete and accurate customer profiles to seize opportunities for meaningful engagement. Sellers need a tool that surfaces critical customer insights from all sources, including CRM data, customer correspondence, and documents, such as contracts.

Surfacing these insights through a unified, AI-powered platform prevents common challenges that drive customers to consider other vendors. These can include:

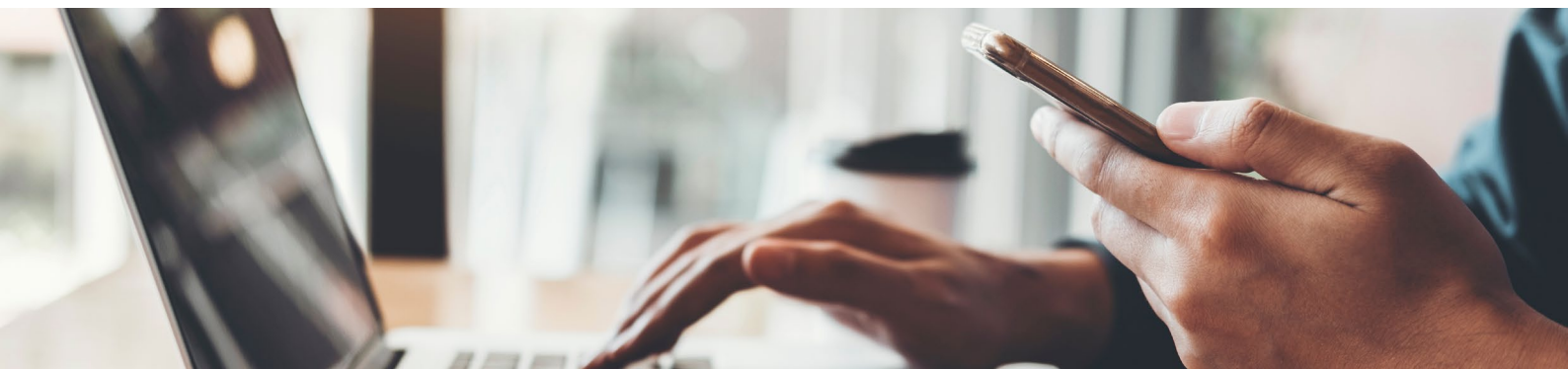
- Longer support cycles
- Poor customer experiences
- Missed account insights and slow responses to customer needs
- Customers forced to repeat themselves due to siloed data

By providing salespeople with current transactional, behavioral and demographic data and insights, companies can equip sellers with critical insight that transforms positive experiences into repeat customers.

Don't forget—Self-service tools that allow customers to quickly and easily submit and upload required documents, such as order forms and identity proofs, speed the sales process, making it more efficient and enjoyable for both buyer and seller.

6. Salesforce, State of Sales, 5th Edition, 2022

7. Ibid.





QUICK TIP

When evaluating compliance, considering the data within documents is just as important as assessing the information contained in the CRM. Inbound documents and generated communications are likely to include sensitive information about individuals, such as personally identifiable information (PII).

4

Secure information to meet growing privacy and security requirements

Eighty-four percent of business buyers expect sales reps to act as trusted advisors.⁸ Customer trust can make or break the sales process. In a climate of new privacy regulations and media coverage of breaches, companies must increasingly reassure buyers that their information is protected.

For sales teams, this means handling customer data, which often contains personal and sensitive information, with care and according to the latest data privacy laws, such as General Data Protection Regulation (GDPR).

Today's customers expect data to be used ethically and governed according to evolving regulations. It must be handled in a way that avoids leaks and aligns with both rules of consent and lawful use. Solutions that boost collaboration by improving data access must deliver without impacting proper governance of information. Companies must demonstrate that they govern data securely, accurately, and in alignment with audit requirements.

Building robust information governance with role-based permissions into cloud content management platforms can ease organizational compliance with mandates and regulations by keeping customer information protected, audit trails accurate, and access secure.

Spend more time selling and less time searching for customer information with SaaS content management and Salesforce CRM integration. Get started.



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⁸ Salesforce, State of the Connected Customer 6th Edition, 2023