

# OpenText Brings Content Management to Your Salesforce

Improve Customer Insight and Streamline Sales  
with OpenText™ Extended ECM for Salesforce®

Every organization wants to increase agility and productivity by extracting maximum value from its processes and content. But knowledge workers in marketing, sales, and services are only as good as the information they can efficiently access. OpenText Extended ECM for Salesforce bridges the silos created by disparate applications in marketing, sales, and services to seamlessly pull structured and unstructured information together and present the complete picture to users who need it.

## CRM and ECM Together Rapidly and Seamlessly

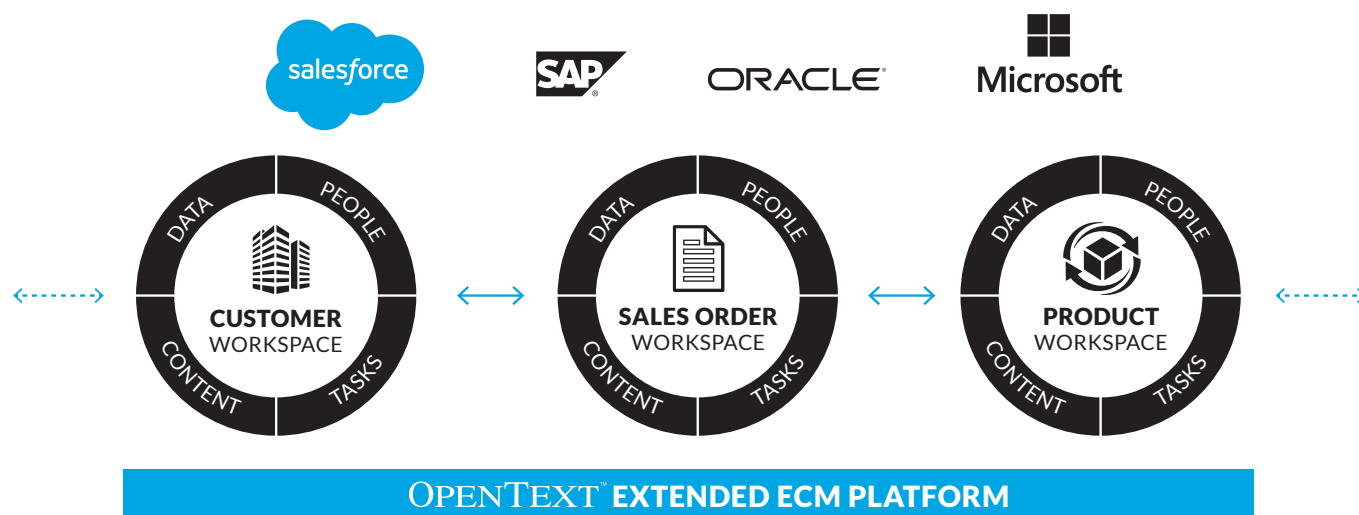
One of the most urgent challenges of Salesforce® customers is to connect their CRM application to other systems and to improve adoption. Integrating content management is a top priority for many Salesforce users, adding to the value of the CRM applications in general. With OpenText Extended ECM for Salesforce, the market leader in content management is finally delivering on this demand.

OpenText Extended ECM for Salesforce connects Salesforce cloud services to the OpenText Extended ECM Platform and surfaces enterprise content management capabilities and ECM content inside the Salesforce user interface.

## BUSINESS SCENARIOS

- Improve sales and service productivity with minimized search time and reduced overhead for content management
- Avoid miscommunication and improve customer experience by equipping all customer touchpoints with a complete view on data and content
- Accelerate sales cycles by sharing and reusing best practice materials
- Simplify the information management landscape by connecting content and processes native to Salesforce®, SAP®, Oracle, Microsoft®, and others
- Securely and compliantly manage vital customer content by applying roles and authorization from Salesforce to content hierarchies
- Enable collaboration and user adoption across organizational silos within familiar user interfaces





*OpenText Extended ECM – Open, Versatile ECM Platform*

The solution builds on OpenText™ Content Suite Platform, which includes capabilities such as Document Management, Records Management, Capturing, Archiving, Workflow, and Collaboration and makes them available to Salesforce users. Connectivity, automated data synchronization routines and UI widgets enhance the Force.com platform to become a content hub for Marketing, Sales and Services.

## From Sales Data Chaos to Streamlined Customer Information

Salespeople don't like managing content but they need content. To build well-founded understanding and insight of their clients, they must be aware of communications. To avoid errors, they need to work with the latest version of contracts, product information, or customer order history and to sell more successfully they want to reuse materials that resonate well with customers. Unfortunately, salespeople do not have the strongest focus on managing and sharing the content with due diligence, which is where OpenText can help.

Extended ECM for Salesforce offers a deep and feature rich integration of the successful OpenText content management platform into Salesforce, including best of breed user experience and functionality, automated routines around content hierarchy creation, linking, and metadata governance. Ensuring that data and content are never out of sync, templates, property providers, and permission profiles allow users to tune content management to organizational policies and guidelines. On top of this, the solution allows flexible deployments connecting the Salesforce cloud to the OpenText Cloud or to on-premise installations.

## Improving Productivity: Make Content Accessible and Relevant

OpenText Extended ECM for Salesforce provides instant, contextual, enterprise-wide information amalgamation, collaboration, and document creation related to the specific case or opportunity on which your employees are working on. By extending and enhancing your Salesforce platform with OpenText, your sales and services representatives can access the relevant information they need dynamically—making them more efficient and on target when it

comes to client development and support. In addition, OpenText solutions help ensure regulatory compliance, adherence to security policies, and cost savings.

## Simplify Content Management Based on One Integrated EIM Platform

Best in class companies know that marketing, sales, and service processes accelerate and improve when campaign dossiers, customer files, and services workspaces deliver complete and up-to-date collections of marketing assets, communication, or field records. On the other hand, content that is indirectly linked to these processes, such as material specifications, machine records, supply chain dashboards, or aggregated IoT data also contribute to excellent customer insight and service.

OpenText Extended ECM mobilizes this data and turns it into competitive advantage by delivering a unified enterprise content management backbone that integrates with the multitude of business applications, runs in hybrid environments, and can be implemented both on-premises or in the OpenText Cloud or Microsoft® Azure™. With OpenText Extended ECM for Salesforce, users of Salesforce, SAP®, Microsoft®, or Oracle software have a unified, 360-degree view of structured and unstructured information directly built into their application UI of choice. They no longer have to separately log on to multiple applications and sort through numerous screens to tie this information together. Microsoft and mobile users are included in Extended ECM solutions as well, accessing content in Windows® Explorer, Microsoft® Office, and Microsoft® SharePoint®, or Microsoft® Office 365™ and working with iOS™ and Android™ apps or the responsive Extended ECM UI on tablets and smartphones. Furthermore, file sharing and sync capabilities can be deployed with OpenText™ Core or OpenText™ Tempo™ Box.

## Optimize Your Marketing, Sales and Services with OpenText Extended ECM for Salesforce

Driving customer insight, improving sales and service productivity, and simplifying IT platforms – three key objectives on every digital business agenda – delivered on a solid information management platform inside your Salesforce application. This is what OpenText offers its customers with Extended ECM for Salesforce.

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