PIVOTAL ROADMAP

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Investment Areas

- Integration
- Platform Updates
- Purpose-built Applications
- Usability
- User Empowerment
- Configuration vs Customization
Integration

REST API

presence. capabilities. performance.
User Empowerment

Enterprise
Personalization
Platform Updates

presence. capabilities. performance.
Configuration vs Customization
Purpose-built Applications
Pivotal 6.5.2

UX Improvements: search features, new dashboard options, reporting, favorites, external user support and refinement of smaller device UI

Toolkit Usability Enhancements

Smart Client Usability Enhancements

Windows 10, Office 2016, Exchange 2016
Toolkit: Search Result List
Quick Access to LD Strings & SRLs
Export all records from a Search Result List
Searching for a Search
Sales 6.5.2 for UX

- New phone specific forms
- Access to reports
- Context menus
- New widgets

Demo
Yammer Integration

Enable the user of Yammer within Pivotal to capture discussions, collaborate and get notified on events.

<table>
<thead>
<tr>
<th>Feature</th>
<th>Benefit</th>
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<tbody>
<tr>
<td>Follow CRM Records</td>
<td>• Stay on top of accounts</td>
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<td>Automatic posts to Yammer</td>
<td>• Get notified on key events</td>
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<td>• Be more proactive vs. reactive</td>
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<td>In-Context Collaboration</td>
<td>• Get answer</td>
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<td>• 360 degree view</td>
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<td>• Non-CRM users can participate</td>
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<tr>
<td>UX and Smart Client Integration</td>
<td>• Collaboration can be access from any Pivotal client</td>
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</table>
presence. capabilities. performance.
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presence, capabilities, performance.
System Post - Tuesday at 4:58pm
Probability to close changed from 20% to 70%

Pivotal CRM

100 Classics Subscription – Boston Harbour Association

James Denton – Tuesday at 4:59pm
Does anyone have the latest pricing information from our competitor ABC 123?

Cathy Williams – Tuesday at 5:02pm
Here you go. I have attached the latest information

James Denton – Tuesday at 5:07pm
Thanks Cathy Williams
Enable integration by providing a new REST API. Providing more visualization options in Pivotal UX.

- Office 64-bit support
- Office 365 support
- End User Personalization
- Smart Client Enhancements
- Toolkit Usability
End User Personalization
Office 365 & Gmail
Modernization of the Pivotal Platform.

- Pivotal Platform Modernization
- Advanced personalization
- Toolkit Usability
- Analytics 2.0