

Maximizing Sales Collaboration with the Latest Cloud Tools

WHY OFFICE 365 IS THE BEST PLATFORM FOR TODAY'S REP FIRMS



Who Am I?

- ▶ Rich Greaves

- ▶ Cofounded Empowering Systems, Inc. with Scott Mayo in 1994
- ▶ Technologist for 35+ years
- ▶ Developing Rep solutions for 20+ years
- ▶ Identifying new solutions to the challenges Reps face
- ▶ Supporting the ERA for 20+ years



What are we talking about today?

- ▶ Collaboration tools
 - ▶ What are you using today?
 - ▶ What are the challenges today
 - ▶ Why use Office 365 to simplify and consolidate platforms
 - ▶ Take advantage of New Collaboration tools in Office 365



How many platforms do you use today?

- ▶ File sharing
- ▶ Email
- ▶ Phone/Text
- ▶ Other Collaboration tools?



The Problem for a Rep Firm

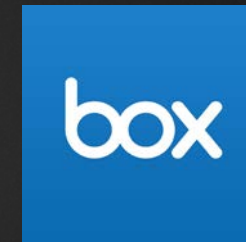
- ▶ File Sharing

- ▶ Local File Server?

- ▶ No easy access outside the office
 - ▶ Maintenance
 - ▶ Do you have a good Backup?

- ▶ Dropbox, Box, Google Drive?

- ▶ Easy, but separate systems
 - ▶ Security concerns



The Problem for a Rep Firm

► Email

- POP Accounts? IMAP Accounts?
- Local Exchange server?
- Hosted Exchange server?
- Access on your phone
 - Can you sync with your desktop
 - Folders/filing and deletions?
- Various service providers



The Problem for a Rep Firm

- ▶ You already use Microsoft Office
 - ▶ How are you licensed?
 - ▶ Older versions? Multiple Versions?
 - ▶ Bought when you got your computer?
 - ▶ How do you keep up with updates?



The Solution: Office 365

- ▶ Single platform
- ▶ Stay current on MS Office Applications
- ▶ Take your Email service and Document sharing to the cloud
- ▶ Leverage Online Capability
- ▶ Take advantage of online collaboration tools



Office 365

- ▶ Single Platform – Consolidate & Simplify
 - ▶ Reduce the juggling apps, solutions, and providers
 - ▶ Simplify Licensing
 - ▶ Email
 - ▶ File Sharing
 - ▶ Collaboration Applications



Word



Excel



PowerPoint



OneNote



Access



Publisher



Teams



Skype for Business



Outlook



OneDrive for Business



Office 365 – Email

- ▶ Migrate to Office 365
 - ▶ Enterprise class email – in the cloud!
 - ▶ Mobile device and desktop work the same
 - ▶ Eliminate local Servers
 - ▶ Eliminate POP and IMAP Accounts at your ISP
 - ▶ Simplify software installation



Office 365 – File sharing

- ▶ Move files to SharePoint
 - ▶ In the Cloud
 - ▶ Available on your desktop and mobile!
 - ▶ Eliminate File Servers/NAS
 - ▶ Eliminate other cloud services
 - ▶ Use OneDrive to sync files



Office 365 – Work on any device

- ▶ PC, Mac, tablet, phone? Reps need to be able to work across a variety of devices from different locations and all need a consistent, clean, and fast experience.
- ▶ Office 365 gives people access to everything they need to get the job done from anywhere. Files and settings are synced from one device to the next, creating freedom and reliability for your team.



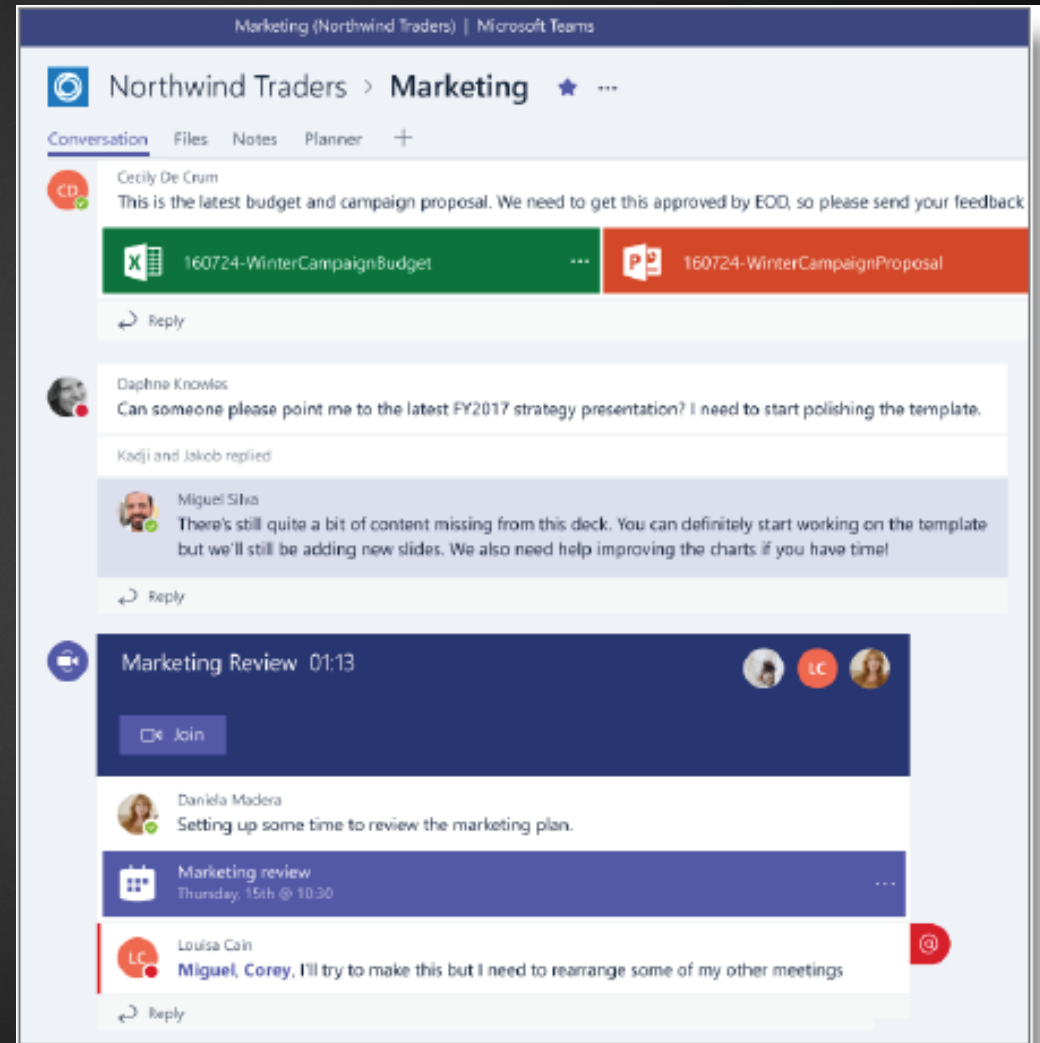
Office 365

- ▶ Always work with the latest version of Office
- ▶ Use and access Office on virtually any device
- ▶ Store, sync, and share files with OneDrive for Business and SharePoint
- ▶ Stay connected and communicate with business-class email
- ▶ Work better together with online meetings and conferencing
- ▶ Trust a financially-backed 99.9% uptime guarantee



Office 365 – The new cool stuff!

- ▶ Microsoft Teams - What is it?
 - ▶ Teams is a chat based hub for collaboration
 - ▶ Combines conversations via Chat, Voice, and video
 - ▶ File Sharing, Meetings
 - ▶ Create “Teams” within your company
 - ▶ Communicate with the Team
 - ▶ Share files with the Team
 - ▶ On any device, Desktop and Mobile



Microsoft Teams

- ▶ Create “Teams” to organize your team’s work
 - ▶ By Function (Outside Sales vs. Inside Sales)
 - ▶ By Geography (North, South, East, West)
 - ▶ By Project (Product Launch, Office Move, etc.)



Microsoft Teams as the Hub for Collaboration

- ▶ Use Teams as the “Entry Point” or Hub for online collaboration
- ▶ Shared Files w/in SharePoint online tied to the Team



Demo



What's on its way?

- ▶ Skype for Business Integration
 - ▶ Calling directly from MS Teams
- ▶ 3rd Party Plugins
 - ▶ Empowering Systems AccountManager – In Outlook
 - ▶ Create and update opportunities from your inbox!



Questions?



In Conclusion

- ▶ Consider Office 365
 - ▶ Consolidate Services
 - ▶ Eliminate Risk
 - ▶ Leverage New Collaboration Tools
 - ▶ Start small and grow into the tools with your team



Thank You!

