



## Presensoft's IM Policy Manager for Salesforce.com

*IM-CRM chat synchronization for Public and Enterprise Instant Messaging to ensure compliance with regulations such as FFIA, SOX, GLBA, HIPAA, GLBA, SEC and FINRA*

Keeping accurate records of all client communication is critical to your business' success, and it brings with it a host of challenges including user participation (ease of use), IT complexities, policy enforcement, regulatory compliance, and eDiscovery requests. Failure to effectively address these issues can have serious repercussions to the ongoing success of your CRM project.

Without the help of **Presensoft's IM Policy Manager for Salesforce.com**, this challenge is virtually impossible to address for the IM conversations taking place over the major IM networks (MSN, AIM, Yahoo, Skype, and Google Talk).

With **Presensoft's IM Policy Manager for Salesforce.com**, another content management concern is put to rest. **Presensoft's IM Policy Manager for Salesforce.com** offers integration between the Presensoft IM Policy Manager and Salesforce.com providing a fully automated process for synchronizing communications with fellow employees, prospects and customers.

**Presensoft's IM Policy Manager for Salesforce.com** makes capturing accurate data easy!

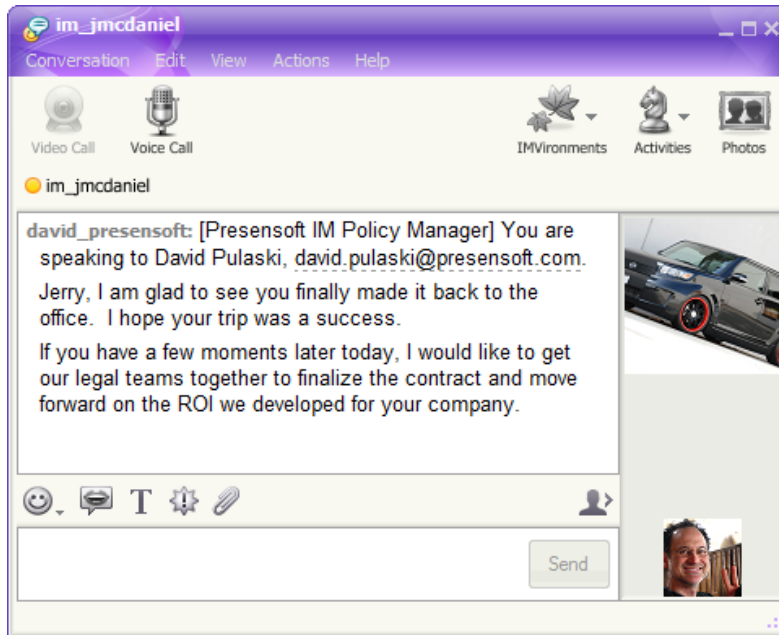
- User participation (ease of use) is seamless and requires no training
- IT complexities are eliminated through a "cloud solution" with no hardware required
- Policy enforcement through Presensoft's web and roles base management console
- Regulatory compliance and eDiscovery requests through Presensoft's IM Policy Manager web console to ensure compliance with regulations such as FFIA, SOX, GLBA, HIPAA, GLBA, SEC and FINRA, as well as safeguard in customer complaints and lawsuits

With **Presensoft's IM Policy Manager for Salesforce.com** you will instantly:

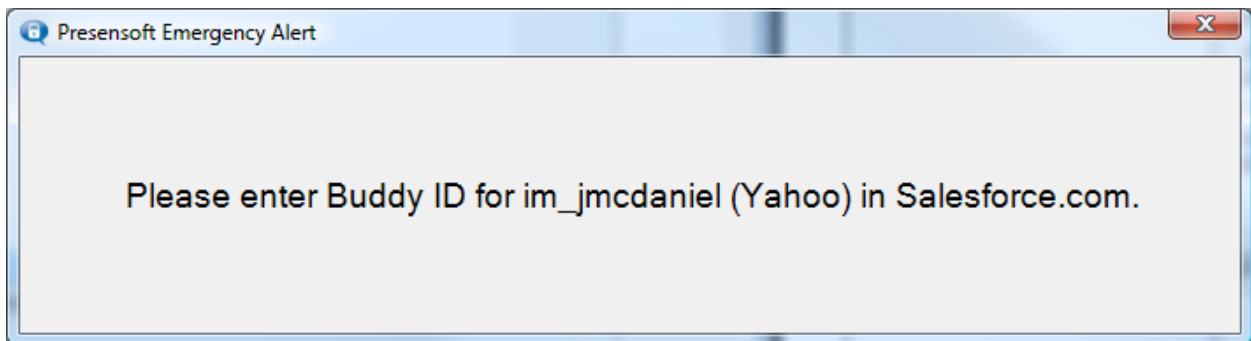
- **Synchronize public and enterprise IM conversation with the Salesforce.com "Call Log" history** for fellow employees, prospects and customers
- **Notify employees of un-registered buddy names** in Salesforce.com contact information for immediate resolution via direct-to-desktop alerts of missing data.
- **Improve employee productivity** with a rapid Return on Instant Messaging (ROIM)<sup>TM</sup>

\* The Presensoft IM Policy Manager is a required software solution ensuring conversations are recorded, even for users with laptops or home offices outside the company gateway.

## Conversation



## Desktop Notification if Buddy ID Missing in Salesforce.com






## Call Log Summary

Activity History						
Action	Subject	Related To	Task	Due Date	Assigned To	Last Modified Date/Time
<a href="#">Edit</a>   <a href="#">Del</a>	IM Conversation (Yahoo)		✓	4/18/2010	David Pulaski	4/18/2010 12:32 PM

## Call Log Detail

Task Detail		<a href="#">Edit</a>	<a href="#">Delete</a>	<a href="#">Create Follow Up Task</a>	<a href="#">Create Follow Up Event</a>
Assigned To	<a href="#">David Pulaski</a>	Status	Completed		
Subject	IM Conversation (Yahoo)	Name	<a href="#">Jerry McDaniel</a>		
Phone	(713) 493-0108	Email	<a href="mailto:jerry.mcdaniel@presensoft.com">jerry.mcdaniel@presensoft.com</a>		
Due Date	4/18/2010	Related To			
Created By	<a href="#">David Pulaski</a> , 4/18/2010 12:32 PM	Last Modified By	<a href="#">David Pulaski</a> , 4/18/2010 12:32 PM		
Comments	<p>[4/18/2010 2:25:38 PM] *** Conversation started *** with 'im_jmcdaniel'</p> <p>[4/18/2010 2:25:40 PM] david_presensoft: [Presensoft IM Policy Manager] You are speaking to David Pulaski, <a href="mailto:david.pulaski@presensoft.com">david.pulaski@presensoft.com</a>.</p> <p>[4/18/2010 2:26:01 PM] david_presensoft: Jerry, I am glad to see you finally made it back to the office. I hope your trip was a success.</p> <p>[4/18/2010 2:26:39 PM] david_presensoft: If you have a few moments later today, I would like to get our legal teams together to finalize the contract and move forward on the ROI we developed for your company.</p>				

## Presensoft Web Console (IM Archive Web Console)



[Log Off](#)  
 Organization: Presensoft  
 Management Console

**Mail Server Setup**

Security Policy

Alerts Settings

Email Scheduler

System Logs

Auto Update

Downloads

Licensing

Inputs

[Display](#) [Clear](#)  Use Database Paging

Hide [-]

From:  To:  Search:  Percentage:

Computers:  Groups:  Users Filter:

Export To:  [Export](#)

Audited	Start Time	End Time	IM Client	IM Client Version	User Name	Buddy ID	Message Length	Computer	Group Name
Yes	4/18/2010 2:26:01 PM	4/18/2010 3:50:43 PM	Yahoo	10.0.0.542	dpulaski	im_jmcdaniel	942	DPULASKI-VAIO	Dave
No	4/18/2010 9:48:41 AM	4/18/2010 9:48:43 AM	Skype	3.8.0.188	dpulaski	davidmiddleman	246	DPULASKI-VAIO	Dave

**Conversation** | **Comments**

[4/18/2010 2:25:38 PM] \*\*\* Conversation started \*\*\* with 'im\_jmcdaniel'

[4/18/2010 2:25:40 PM] david\_presensoft: [Presensoft IM Policy Manager] You are speaking to David Pulaski, [david.pulaski@presensoft.com](mailto:david.pulaski@presensoft.com).

[4/18/2010 2:26:01 PM] david\_presensoft: Jerry, I am glad to see you finally made it back to the office. I hope your trip was a success.

[4/18/2010 2:26:39 PM] david\_presensoft: If you have a few moments later today, I would like to get our legal teams together to finalize the contract and move forward on the ROI we developed for your company.

[4/18/2010 3:34:26 PM] im\_jmcdaniel: [Presensoft IM Policy Manager] You are chatting with Jerry McDaniel, my email is [jerry.mcdaniel@presensoft.com](mailto:jerry.mcdaniel@presensoft.com) and my phone number is 713-493-0108 X3

[4/18/2010 3:50:43 PM] \*\*\* Conversation ended \*\*\* with 'im\_jmcdaniel'



## Return on Instant Messaging (ROIM)<sup>TM</sup>

*\*Time savings of only 10 Minutes / Day*

### **\$40,000 / Year Employee**

Minutes Per Day Saved	10
Annual Compensation	\$ 40,000
Savings per Day*	\$ 3
ROI for Annual User License (Days)	48
ROI for Annual User License (Weeks)	10

### **\$80,000 / Year Employee**

Minutes Per Day Saved	10
Annual Compensation	\$ 80,000
Savings per Day*	\$ 7
ROI for Annual User License (Days)	24
ROI for Annual User License (Weeks)	5

### **\$120,000 / Year Employee**

Minutes Per Day Saved	10
Annual Compensation	\$ 120,000
Savings per Day*	\$ 10
ROI for Annual User License (Days)	16
ROI for Annual User License (Weeks)	3

### **\$160,000 / Year Employee**

Minutes Per Day Saved	10
Annual Compensation	\$ 160,000
Savings per Day*	\$ 14
ROI for Annual User License (Days)	12
ROI for Annual User License (Weeks)	2

*Please contact Presensoft for ROI calculator to enter your unique information.*