



Frequently Asked Questions



Table of Contents

FAQs for IMRs.....	page 3
FAQS for Manufacturers.....	page 8
Learn More.....	page10



Leading the
Channel Forward™

Frequently Asked Questions - IMRs

1. Why the IMR 2.0 initiative?

- a. IMR 2.0 (and beyond) is a new standard of expectations helping Manufacturers and IMRs create better strategic value for each other while satisfying the evolving End User and Channel 2.0 (and beyond) needs. IMR 2.0 is about increasing the professionalism of independent rep firms (IMRs) thereby elevating their position in the Manufacturer and Distributor community. IMR 2.0 will help both IMRs and Manufacturers benefit from our channel's transformation and not fall victim to it.

2. Why one platform?

- a. The current limiting factor is the multitude of data formats being shared (if any) between IMRs and their Principals. If data is being shared, its typically activity based and outdated as soon as the file is sent. Also the lack of a common sales process and language creates confusion around realistic goal setting and forecasts. Moving to one platform as the industry standard address these challenges while enabling IMRs and their Principals to collaborate real-time on winning deals faster and better. It also creates the opportunity to standardize sales training, further increasing the strategic value for IMRs in the Manufacturer and Distributor community.

3. Why PipelineDeals?

- a. Our goal was to select a software provider whose core competency was Pipeline Management and CRM, and who had a proven track record of success. We were laser focused on making sure it would be simple to implement (no IT required), simple to use (high adoption), ready to use right out of the box (IMR 2.0), would make collaboration across stakeholders simple (SuperShare) and would automate certification (IMR 2.0 Certified). We also wanted a cost effective platform that would remove the cost barrier for ISA's IMR members and their Principals. PipelineDeals met all these requirements and are committed to our IMR 2.0 initiative and making our IMR and Manufacturer members successful.

Frequently Asked Questions - IMRs

4. Can I keep my current CRM?

- a. Moving to the IMR 2.0 platform and participating in the IMR 2.0 initiative is completely voluntary. However, you need to be on the IMR 2.0 platform to benefit from all it offers including the IMR 2.0 Certification. You can however, keep your current CRM and API into the IMR 2.0 platform understanding you would incur additional API expense and duplicate costs supporting 2 software licenses per user (your current CRM license and PipelineDeals IMR 2.0 license). You can contact PipelineDeals to explore if API is the right solution for you.

5. Are there upfront costs converting my existing CRM to PipelineDeals?

- a. One of our primary goals in going with PipelineDeals was how simple it was to implement the IMR 2.0 platform even if you already have a CRM database in place. Most will be able to convert their database on their own with no additional costs. PipelineDeals has excellent video tutorials demonstrating how easy it is to do on your own. You can also e-mail, call or chat with their Customer Care Team to address specific questions you may have. For companies looking for PipelineDeals to manage the data migration for them, contact PipelineDeals for migration services pricing.

6. Do I have to become IMR 2.0 Certified?

- a. No, participating in the IMR 2.0 initiative is completely voluntary. We do however believe that IMRs that become IMR 2.0 certified will differentiate themselves while being recognized as the progressive IMRs that Manufacturers and Distributors want to do business with. IMR 2.0 is about increasing the professionalism of independent rep firms (IMRs) thereby elevating their position in the Manufacturer and Distributor community. IMR 2.0 will help both IMRs and Manufacturers benefit from our channel's transformation and not fall victim to it.

Frequently Asked Questions - IMRs

7. Are there rep firms in ISA that have already adopted the IMR 2.0 Platform standard?
 - a. Although this has not formally launched prior to this weeks IMR 2.0 Business and Planning Conference here in Chicago, several of the IMRs on the IMR 2.0 Committee have already moved or are in the process of moving from their current CRM software to the IMR 2.0 platform.

8. Am I in control of what pipeline information is shared with who?
 - a. Absolutely! This was a critical part of the IMR 2.0 platform design. You as the IMR are the direct client of PipelineDeals. You own your IMR 2.0 platform and as such who you share your pipeline with is your decision. You control this through the SuperShare process. You can share your pipeline with your Manufacturer Principals and/or Distributors. Collaboration made simple. Doesn't get much easier!

9. Can I share my pipeline even if my Principal or Distributor is not a current ISA member?
 - a. Absolutely! This was a critical part of the IMR 2.0 platform design. You as the IMR are the direct client of PipelineDeals. You own your IMR 2.0 platform and as such who you share your pipeline with is your decision. Having said that, take pride in what we are doing by recommending the Manufacturer or Distributor join ISA. Them being members will get them engaged in our initiatives including IMR 2.0 and beyond helping them realize and appreciate the added value you bring and how they can fully engage with you as a strategic partner.

10. What type of training will be available to help my company onboard with PipelineDeals and the IMR 2.0 platform?
 - a. One of our primary goals in going with PipelineDeals was how simple it was to implement the IMR 2.0 platform even if you already have a CRM database in place or starting from scratch. Most will be able to convert their database on their own with no additional costs. PipelineDeals has excellent video tutorials demonstrating how easy it is to get started on your own. You can also e-mail, call or chat with their Customer Care Team to address specific questions you may have.

Frequently Asked Questions - IMRs

11. What type of Sales Process training will there be for my team?

- a. ISA has developed a comprehensive IMR 2.0 Sales Playbook that will be made available for IMRs that adopt the IMR 2.0 platform. This playbook is designed for sales leaders and their team to accelerate the learning and adoption curve helping their organizations understand the power of the IMR 2.0 sales process and how that process will better align with the End Customer helping them close deals better and faster. We will also incorporate additional IMR 2.0 sales training webinars and education sessions as needed.

12. What is ISA's overall certification vision for IMRs?

- a. Our vision is to have a 3 level certification process that builds on each other. We are working on IMR 3.0 now. IMR 4.0 is not fully defined at this point. See below for more information and tentative timing:



13. Will my information be accessible to others?

- a. No! This was a critical part of the IMR 2.0 platform design. You as the IMR are the direct client of PipelineDeals. You own your IMR 2.0 platform and your data. You are in control of who you share your data with. ISA does not and will not have any pipeline related data other than a few high-level KPIs needed to automate the IMR 2.0 Certification process.

Frequently Asked Questions - IMRs

14. What KPIs will be provided to ISA for IMR 2.0 Certification?

- a. IMR companies that 1) are on the IMR 2.0 platform 2) adding new deals 3) closing deals. Our goal is to keep it simple while providing credibility to the IMR 2.0 Certification process. Data set are 3 simple Yes/No flags with all 3 needing to be “Yes” for Certification. This will encourage Manufacturers to engage and work with IMR 2.0 Certified rep firms.

15. When will the IMR 2.0 Certification start?

- a. Certification will start and be recognized at the ISA Convention next April in Atlanta. This will provide ample time for IMRs who choose to participate in the IMR 2.0 initiative and the IMR 2.0 platform. We will recognize IMRs that meet the certification criteria as defined in point #14 above by adding an IMR 2.0 Certification seal on their ISA profile that is searchable by any ISA member. They will also be recognized during the IMR 2.0/3.0 education session as well as on their booth signs in Atlanta.

16. How will Certification benefit my business?

- a. Certification is differentiation. There are numerous benefits. IMR 2.0 will elevate the professionalism of your sales team while improving your strategic partnerships with your Principals. Also real time simple collaboration with stakeholders of your choosing will help you win deals faster and better improving your bottom line. You will be recognized as a progressive rep firm that Manufacturers and Distributors will want to do business with.

17. What does ISA get out of this?

- a. ISA does not get any financial incentives, rebates, fees or kickbacks of any kind from PipelineDeals for the IMR 2.0 platform. OUR GOAL IS SIMPLE: “To Help Advance the Professionalism and Utilization of Industrial Manufacturer Reps”.

WE ARE ON A MISSION TO CREATE MORE VALUE FOR ISA, ITS MEMBERS AND THE INDUSTRIAL CHANNEL

Frequently Asked Questions - Manufacturers

1. If all my reps are IMR 2.0 Certified does that mean its possible to get one aggregated (SuperShare) pipeline in real time?
 - a. Yes! That was a key goal in the design of the IMR 2.0 platform. SuperShare access is provided and controlled by your IMRs who are on the IMR 2.0 platform. Access to you or others in your company is done by the IMR pending their approval to do so. If all your IMR 2.0 rep firms give you access you will have one consolidated aggregated pipeline!
2. What does it cost me to get the pipeline once my IMR 2.0 rep provides me SuperShare access?
 - a. There are no license fees from PipelineDeals for Manufacturers and/or Distributors that are given access to the SuperShare pipeline by an IMR 2.0 rep firm.
3. Can I import the SuperShare pipeline into my current CRM?
 - a. Yes! SuperShare pipelines can be exported to Excel and imported into your CRM.
4. Some of my reps are not ISA members, what about them?
 - a. To become ISA IMR 2.0 Certified they need to join ISA and become a member. This is one of the many benefits they will receive through membership. If your goal is to maintain and gain market share through a meaningful strategic relationship based on real-time information and collaboration, IMR 2.0 Certified rep firms gives you the best process to win! Encourage them to join ISA and be part of the Channel 2.0 transformation and not fall victim to it.
5. Is PipelineDeals for IMRs only or can Manufacturers use it as their pipeline and CRM tool?
 - a. Many Manufacturers use PipelineDeals as their CRM tool. It's a simple cost effective tool that gives you what you need without all the complexity. Having PipelineDeals as your management tool would eliminate the need to import the SuperShare pipeline into your pipeline making collaboration with reps and your direct sales team even easier.

Frequently Asked Questions - Manufacturers

6. What is expected of Manufacturers who want to participate in this initiative?
 - a. Several things. First, a commitment to support the IMR 2.0 platform, sales process, sales stages, and SuperShare formatting - our common industry language. Next, a code of ethics ensuring that pipeline information shared through SuperShare is used to strengthen the strategic partnership. Finally, to engage in the SuperShare pipeline access by collaborating on meaningful deals to help the IMR and you win deals faster and better.

7. Will there be certification for Manufacturers aligned to the IMR 2.0 (and beyond) initiative?
 - a. The IMR Committee (made of up Manufacturers and IMRs) are reviewing that now. Our goal is to create some level of certification for Manufacturers differentiating them as progressive and supportive strategic partners to do business with.

8. How does the IMR 2.0 (and beyond) initiative benefit my business
 - a. Certification is differentiation. Utilizing certified IMR 2.0 rep firms will elevate the skill set and professionalism of your sales teams. You will be able to collaborate on meaningful deals that can move your needle - all in real time. Your budgets and topline forecast will be more accurate. You will move to a strategic relationship with certified IMRs fostering deeper trust based on collaboration, channel 2.0 strategies and mutual success. Finally, you will position your organization as an organization and company certified reps will want to do business with.



Interested in Learning More?

Learn more about ISA - visit:
www.isapartners.org

Learn more about the IMR Network - visit:
www.isapartners.org/networks/imr

Get an IMR 2.0 Platform Demo - visit:
www.pipelinedeals/imr

PipelineDeals Key Contact:
Ashley Willhalm - Senior Manager of Customer Teams
ashley@pipelinedeals.com
(415) 317-3229



Leading the
Channel Forward™