HP Relate

Sophisticated documents, simplified

Make better connections with your customers. Produce more sophisticated, personalized communications while spending less time and effort.

You work hard to build your customer relationships. After you've done the research, the cold calls, the legwork, and the face-to-face, you want to leave customers with something that makes a lasting impression.

While your Salesforce system has all the information you need to create a compelling document, the process is often so manual and tedious that producing one on the spot is out of the question. By the time you've chosen from a host of templates and put together a presentable communication, the opportunity has gone cold.

What you need is a simple way to create more sophisticated communications that relate to customers in meaningful ways.

HP Relate helps you easily and quickly design, customize, and deliver communications that have a real impact on customers. With just a few clicks of your mouse, you can create targeted and customized communications that include all relevant customer information, presented in a compelling way.

For example, you can select infographics—such as charts and graphs—that attract your customers' attention and simplify complex information. The graphics can be automatically populated to reflect customer data in Salesforce, making them both highly accurate and effortless to create.

Your documents show the latest data from Salesforce, including customer data, compliance information, and approved brand elements. You can also add personal messages to close the connection loop.

When you're ready, you can easily print your communication, save it to Salesforce, or send it to other delivery channels, including email and social media.
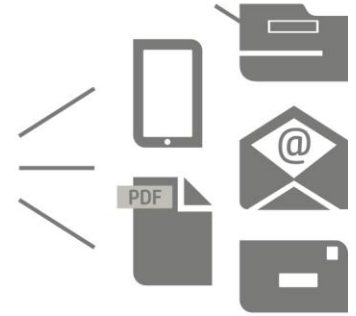
Design → **Customize** → **Deliver**

How does it work?

Design

HP Relate's intuitive designer makes it easy to design templates to meet the needs of everyone across your business. You can create new content and simply drag and drop the Salesforce data you need into your design.

Template designers can ensure that certain content—including brand logos and compliance information—is always included, while giving users the freedom to select other items—such as messages or data-driven charts and graphs—and edit content. By adding helpful features like drop-down lists and check boxes, designers can make it even easier for users to tailor content for specific customers.

Customize

From an easy-to-use interface, users across your business can choose the template appropriate for their needs, and then select the content they wish to include.

You'll be sure that all of your communications are compliant and offer customers a consistent experience. This blend of consistency and personalization can increase customer loyalty, as communications are always relevant and do not confuse customers with outdated information.

Deliver

Once the communication is complete, you can choose the delivery channel your customer prefers. You can print the communication immediately, mail it, or deliver electronically via email or social channels.

Close the deal

Still not sure how HP Relate can help? Consider the following:

Dave, a financial advisor working with a small firm, has a sales meeting with a prospective client. Before the meeting, Dave accesses HP Relate and selects a proposal template.

As Dave interviews the client, he selects relevant options regarding her financial situation and goals. As the meeting draws to an end, Dave finalizes his communication, saves it as a PDF, and asks the client if she'd like to review the proposal right then.

The client is pleased at the opportunity to review the proposal so quickly, and after seeing her options presented in a clear and compelling way, she decides she'd prefer a more aggressive approach for her investments.

Dave quickly makes the requested changes. By the time the meeting ends, he has turned a prospect into a client.

Learn more

For more information about HP Relate go to **www.hprelate.com** or contact us at 1-800-888-0182.