



KEMENTERIAN DIGITAL
JABATAN DIGITAL NEGARA

Presentation from Telcowin
4 November 2024

Future-Ready approach for Jabatan Digital Negara

CEO FOREWORD



Hafiz Izwan

CEO

At Telcwin, we believe that declaring 'You are going to Win' is merely the beginning; we **go the extra mile to wholeheartedly support our clients**, while ensuring the utmost satisfaction of their customers with the **most advanced CRM (Customer Relationship Management) solutions** and trends available in the market.

As we venture further into the fourth industrial revolution, marked by the pervasive influence of AI and IoT, Telcwin is committed to **empowering organizations to elevate their business performance** through **cutting-edge technology and solutions**.

By harnessing the unparalleled capabilities of the world's #1 CRM platform, we enable our clients to stay at the forefront of CRM advancements, optimising their sales and marketing objectives zing their sales and marketing strategies while engaging their customers with memorable, personalized experiences that foster loyalty and enduring relationships.



Speaker



Albukhari Amir
Ent Account Manager,
Telcowin Sdn Bhd



Eason Wang
Channel Resell Director,
DocuSign



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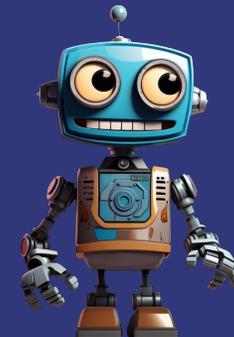
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WHY TELCOWIN





ABOUT TELCOWIN



INTRODUCTION

TELCOWIN, an acronym for **Telling Companies How to Win**, symbolizes our **dedication to guiding businesses towards success**.

Our team of proficient and enthusiastic professionals thrives by **building collaborative relationships** with our esteemed clients. We are proud to have the unwavering support of our renowned global partner, Salesforce, which has granted us the distinguished **Summit Consulting Partner** status.

As the leading **Authorized Reseller of Salesforce and Whatfix in Malaysia**, our commitment lies in providing our clients with **innovative, cost-effective, and tailored solutions**. We strive to consistently address the unique challenges and goals of our clients, empowering them to attain unprecedented levels of success through our cutting-edge offerings.



OUR CUSTOMERS

Partnering with diverse organizations, we foster enduring relationships built on trust, collaboration, and a shared commitment to achieving exceptional results.



AWARD: PARTNER OF THE YEAR 2020

Telcwin is a Salesforce Summit Consulting partner in Malaysia and the Best Multi-Cloud Partner of the Year. This award recognises Telcwin's collaboration with one of Malaysia's top conglomerate.

One of our customers had embarked on a digital transformation path with several objectives in mind. They wanted **to simplify their business processes and establish a single source of truth for customer data**. They also wanted to establish an end-to-end visibility over their sales lifecycle.

Telcwin helped this customer by **seamlessly integrating Salesforce solutions with multiple non-Salesforce systems**. We implemented custom components that expanded customer's digital capabilities on the service front and improved sales visibility. This gave the sales team the **agility to connect and engage** with customers across multiple digital channels.



WHAT CUSTOMERS SAY ABOUT US

Hear directly from our valued clients as they share their experiences, highlighting the impact of our solutions and the strength of our partnerships in driving success and satisfaction.

Telcwin is one of the most pleasant Salesforce partner in Malaysia to work with based on our experience. Not only their response time is quick but they're also always available to assist us. Their ability to understand our business need and adding value-added thought process into it is what sets them apart.



Telcwin team is a group of highly trained professionals who provides excellent business solutions, and focused project management that seeks to meet clients expectations and requirements. As the CRM Project Manager, I am pleased to have worked with them on our CRM Journey.

IJM LAND

Telcwin came to see us at the time we needed the help the most! We wanted something that is not just selling tickets! They have that and their undivided assistance and solutions complemented by an efficient delivery team make us put our trust in their service. We recommend business owners and risk takers to get their Salesforce support throughout the journey. Trust me, Telcwinners are like friends to their partners. As they say friends want to best from their friends.



Good!



WHAT CUSTOMERS SAY ABOUT US

Hear directly from our valued clients as they share their experiences, highlighting the impact of our solutions and the strength of our partnerships in driving success and satisfaction.

Great experience and overall positive experience.



Overall, we are satisfied with their capability in CRM, quick understanding of our requirements and ability to provide much needed solutions. They also have excellent product knowledge.



Partner understands client's needs, adheres to the campaign requirement and complies to the deadlines. Partner is fast to adopt to our business needs, considering the project complexity level is not present in their existing engagement with other clients.



We hired Telcwin to work on creating an application database and streamlining application assessment for a scholarship opportunity. Telcwin designed a system for us based on the Salesforce Sales Cloud that was easy to use and understand. Telcwin provided helpful feedback and guidance that helped us further streamline and guidance and had a strong personal touch that allowed us to execute smoothly.



YAYASAN
TUNKU ABDUL RAHMAN





TELCOWINNERS



LEADERSHIP TEAM

Hear directly from our valued clients as they share their experiences, highlighting the impact of our solutions and the strength of our partnerships in driving success and satisfaction.



Abdul Razak Saad
Chief Operation Officer



Nicole Kok
Revenue and Operation



Kharbilan Ratha
Consulting Service



Azfar Ahmad
Project Delivery



THE TELLOWINNERS

Our team is a carefully curated group of **82 dedicated and seasoned consultants**, with a strong presence across TWO dynamic cities: Kuala Lumpur and Kolkata.

But what sets us apart is our **unwavering commitment to putting our customers first**, every step of the way. From the initial consultation to the final implementation, we go above and beyond to ensure that our clients achieve their desired business outcomes.

It's this **passion for excellence** that drives us forward and fuels our relentless pursuit of success. At our core, we believe that **every customer deserves exceptional service and support**, and we're proud to deliver just that.





SOLUTION OFFERING

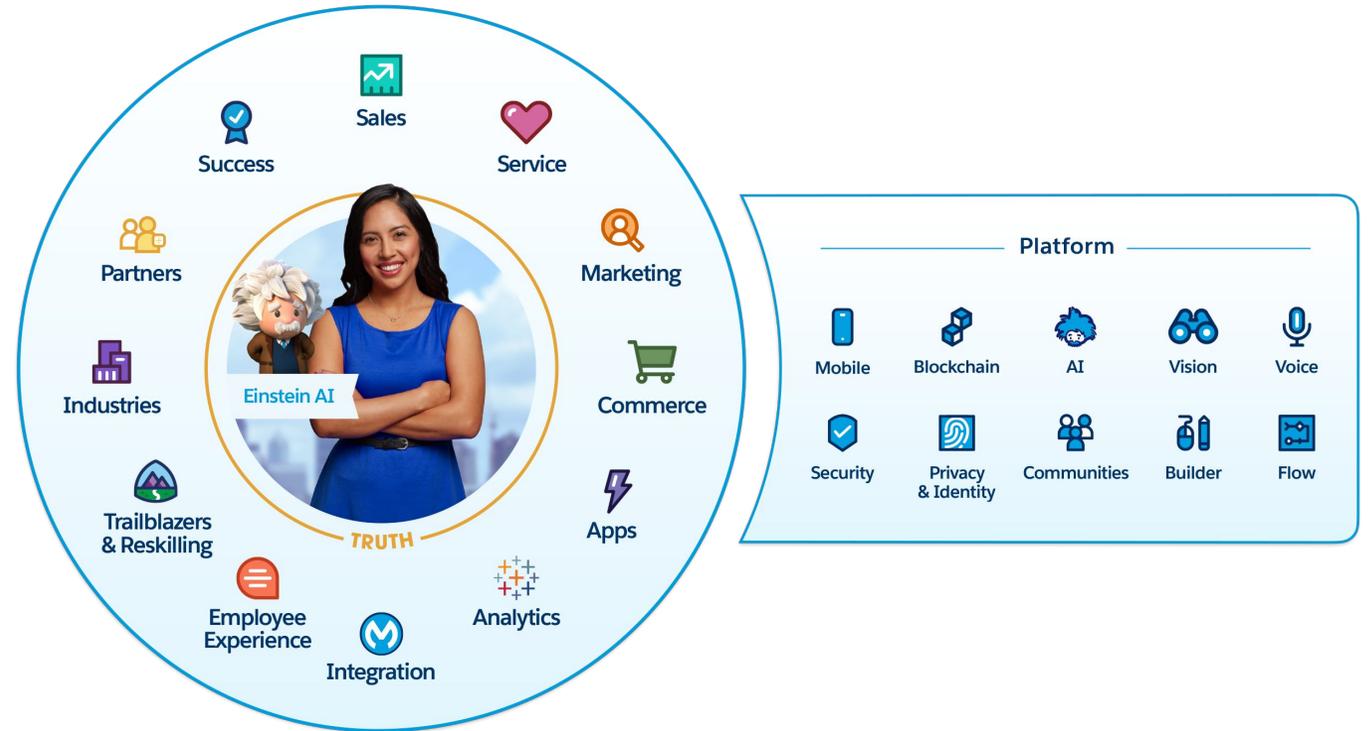


SALESFORCE

As a leading consulting company in Malaysia, Telcwin is dedicated to delivering exceptional Salesforce® solutions to clients across diverse industries such as property, utilities, aviation, financial services, and retail.

With years of experience implementing successful projects, our team has gained invaluable hands-on expertise that enables us to provide comprehensive guidance and support to our clients at every stage of their Salesforce® adoption journey.

We are committed to ensuring that our clients receive the highest quality service and achieve optimal results from their Salesforce® investment.

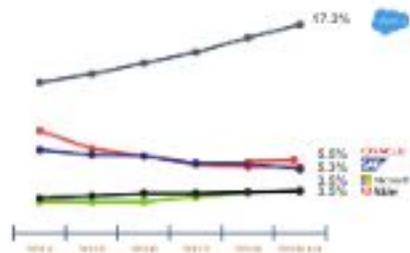


SALESFORCE STANDS OUT AS PREEMINENT GLOBAL ENTERPRISE SOLUTION

#1

N CRM

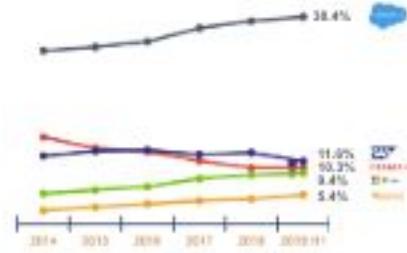
Worldwide CRM applications 2019H1 revenue market share by IDC.



#1

IN SALES

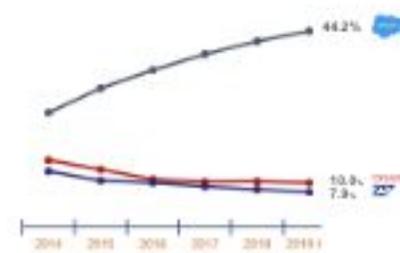
Worldwide salesforce productivity and management applications 2019H1 revenue market share by IDC



#1

IN CUSTOMER SERVICE

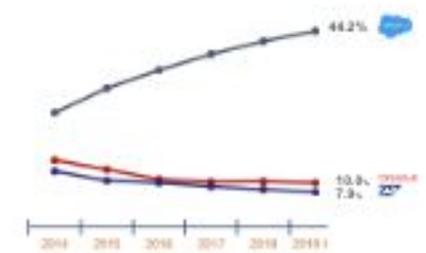
Worldwide customer service applications 2019H1 revenue market share by IDC



#1

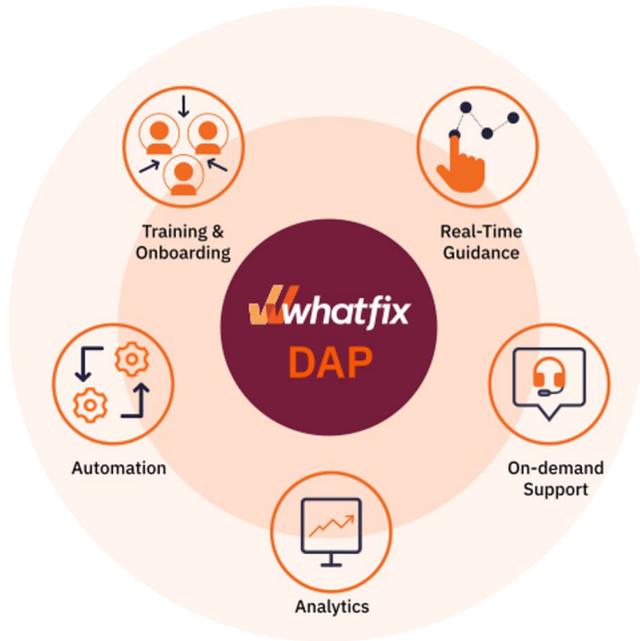
IN MARKETING

Worldwide marketing campaign management applications 2019H1 revenue market share by IDC



Source: IDC, Worldwide Semiannual Software Tracker, October 2019. CRM market includes the following IDC-defined functional markets: Sales Force Productivity and Management, Marketing Campaign Management, Customer Service, Contact Center, Advertising, and Digital Commerce Applications. IDC declares a statistical tie in the worldwide software market when there is a difference of 0.5 percentage-point or less in rounded revenue market share among two or more vendors.

DIGITAL ADOPTION PLATFORM



Whatfix is a real-time digital guidance tool that accelerates Application adoption (Salesforce, Success Factor etc).

Whatfix’s Contextual and Interactive walkthroughs help Salesforce users to master the product while a task is being performed. This helps Sales teams to achieve better opportunity close rates, navigate complex sales processes, shorten sales cycles, preserve high levels of data quality, and become Salesforce experts - all while learning at their own pace, in the flow of work.

31%
Increase
productivity
of sales reps

53%
Reduction on L1
support queries

85%
Reduction on
training costs

3x
Faster time to
proficiency for
new employees

DIGITIZATION IN THE CONTEXT OF DIGITAL ADOPTION PLATFORM

THE PIT STOPS FOR USER ADOPTION





SERVICE OFFERING



WHAT WE DO

Envision Salesforce, envision Telcwin. Our team has **honed expertise within the Salesforce ecosystem** and joined forces with **pioneering tools like WhatFix, ensuring unparalleled value for our clients**. We continually forge partnerships with **trailblazing solutions to exceed customer expectations**.

Our devoted Telcwin team champions your quest for extraordinary results. Harnessing the power of **cutting-edge technology**, we enable clients to **surpass industry standards and thrive in a competitive landscape**.



Salesforce Consulting

Our team of proficient consultants delivers **tailored Salesforce strategies**, enabling clients to maximize the benefits of this platform. We guide businesses through every aspect of Salesforce implementation, optimization, and innovation, unlocking new avenues for growth and success.



Project Delivery

Leveraging our team of seasoned professionals with extensive Salesforce and DAP expertise, we are resolute in our commitment to **realizing our clients' digital objectives and driving transformative outcomes**.



Digital Adoption

At the core of every engagement with our clients lies digital adoption. Our responsibility is to ensure **seamless onboarding for your workforce** as they transition to new solutions, harnessing the power of tools like Whatfix's Digital Adoption Platform when necessary to facilitate a **smooth adoption experience**.



Telcwin Beyond

Our expert consultants provide **comprehensive application management solutions**, ensuring seamless operation and maintenance of your critical applications. We focus on **optimizing performance, mitigating risks, and delivering continuous improvements** to help drive your business success.

CAPABILITIES MAPS

COUNTRIES	MALAYSIA		INDONESIA	
INDUSTRIES	FINANCIAL SERVICES	ENERGY AND UTILITIES	PROPERTY AND REAL ESTATE	EDUCATION
CAPABILITIES	FINANCIAL SERVICES CLOUD	EDUCATION CLOUD	ENERGY AND UTILITY CLOUD	CPQ
	SALES CLOUD	MARKETING CLOUD	SERVICE CLOUD	DATA CLOUD
	PARDOT	COMMUNITY CLOUD	FIELD SERVICE LIGHTNING (FSL)	SLACK

INTERNAL
 PARTNERSHIP



TELCOWIN IN SALESFORCE ECOSYSTEM

GROWING STRONGER IN THE ECOSYSTEM

CONSULTING

Deliver strategic business consulting, system design, solution integration, and product implementation.

MANAGED SERVICES (MSP)

Provide ongoing, recurring services and support post-implementation to drive long-term customer success.



salesforce

Salesforce Partner Program

CLOUD RESELLER

Resell or distribute Salesforce products in emerging markets

APPEXCHANGE (ISV)

Develop and go-to-market with software solutions built on or integrated with the Salesforce Platform



SUCCESS STORIES





UEM SUNRISE BERHAD

DEVELOPER / REAL ESTATE

In all UEM Sunrise projects, whether local or international, UEM Sunrise are guided by their corporate responsibility objective of 'Building Beyond Buildings', and to make a lasting positive impact on the communities. They build happy communities through products which satisfy customers' needs and desires and sustainable developments that care for the holistic well-being of residents—socially, physically and spiritually. For that, UEM Sunrise are more than just builders—they are placemakers.

CHALLENGES

UEM SUNRISE face challenges with their current legacy solution, which lacks flexibility and user-friendliness, hindering mobility and speed. Marketing efforts on traditional platforms don't align with customers' preference for social and digital channels.

Siloed systems between marketing, sales, and customer service impede UEM Sunrise from delivering a seamless customer experience.

By addressing these challenges, UEM Sunrise can fulfill their commitment of 'Building Beyond Buildings', creating thriving communities that nurture residents' well-being. As placemakers, they will make a lasting positive impact on the communities they serve.

250 LICENCES

APPLICATION



FEATURED PRODUCTS

-  Sales Cloud
-  Service Cloud
-  Marketing Cloud
-  CRM Analytics

SOLUTIONS

- Organized their data based on the best practices of the property industry and fast data sync for all parties in organization..
- UEM Sunrise's management is now able to do approvals on-the-go and with Quick Booking, sales reps could make bookings in 2 minutes.
- Management now has an end-to-end visibility of all processes from the lead stage until the property has been sold and handed over to the customer - all in one platform.
- Achieved increase of annual revenue by 40% on the first year of using Salesforce CRM

CHALLENGES

IJM land has about 100 sales rep in multiple region in Malaysia, and been using different platform and management unable to get the consolidated overview of the progression of sales activities.

IJM Land also had a challenge where the leads that came and not being able to track efficiently,

Marketing did not have platform that to re-target existing and new clients. And looking for consolidated platform for all region and the data can be used for marketing purposed hence they adopted Salesforce.

The Management unable to see the movement the leads and nurture the leads from semi qualified to qualified.

SOLUTIONS

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APPLICATION



FEATURED PRODUCTS

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-  Marketing Cloud
-  CRM Analytics

CUSTOMER'S FEEDBACK

“Telcowin team is a group of highly trained professionals who provides excellent business solutions, and focused project management that seeks to meet clients expectations and requirements. As the CRM Project Manager, I am pleased to have worked with them on our CRM Journey”



MYRA X OIB

DEVELOPER / REAL ESTATE

CHALLENGES

Due to the impact of Covid-19, the company faced the challenge of suspending construction work and transitioning approximately 159 employees to remote work.

The company encountered difficulties with their fragmented customer management system, where customer records were primarily stored as physical files. As a result, even basic customer requests required the manual search and review of paper files.

The company's commitment to maintaining a competitive edge involved an ongoing focus on relationship building, providing meaningful education, and delivering personalized customer experiences.

SOLUTIONS

- The subsequent action involved assessing the company's methods of gathering customer data and managing customer records. The company opted to utilize Sales Cloud as its CRM system and implemented Pardot for marketing automation.
- The implementation of Sales Cloud resulted in a significant reduction in the cost per lead, achieving a range of 65% to 70%.
- Furthermore, the adoption of Pardot contributed to a notable decrease in the customer drop-off rate, lowering it from 6.7% to 1.45%.
- During the outbreak, the company managed to maintain a high level of operational efficiency, ranging from 70% to 80%, across most departments.
- From the middle of March 2022, the company generated sales bookings amounting to MYR\$82 million.
- 60% REVENUE INCREASE

APPLICATION



FEATURED PRODUCTS

-  Sales Cloud
-  Pardot
-  Marketing Cloud

CUSTOMER'S FEEDBACK

“With Salesforce, we are now able to act more as a personalised consultant than a standard property developer. We can provide advice and support throughout the entire customer journey – from initial finance to the final interior design.”

KEN GOH | HEAD OF MARKETING, MYRA



PETRONAS DAGANGAN BERHAD

OIL & GAS

Petronas Dagangan Berhad is the principal marketing arm of Petroliaam Nasional Berhad (PETRONAS). Incorporated in Malaysia in 1982, PDB has since established itself as Malaysia's leading retailer and marketer of downstream oil and gas products. One of PBD's offerings include its loyalty programme called Mesra. The challenge PBD faced with this programme was that there were over 2 million customer data that were lying dormant, underutilized and unsegmented. They wanted to engage with their loyalty programme users every step of the way in a creative and timely manner.

CHALLENGES

- Petronas Dagangan Berhad (PDB) had approximately 4 million customer loyalty related data that the company was sitting on which were not segmented.
- PBD's analytics team previously obtained data submission from the IT team and had to wait for a prolonged period to get access to these customer data that were submitted from multiple sources. Although campaigns were strategized, the delayed access to data caused the marketing team to miss the opportunity window to engage with customers on time.
- PBD had a vision as to how it wanted to engage with its customers to drive Mesra and Setel loyalty but there were no tools or customer journey to execute this vision.
- Our customer also had a very siloed system that it used previously to execute its digital marketing activities. For example its email and mobile marketing were running on separate platforms.
- The email marketing solution utilized by PBD previously limited the number of links.
- PBD wasn't able to ascertain the performance of its contents to create more personalized and engaging content for its various loyalty customer personas.
- PBD did not have the visibility to analyze the performance of its subject copy.
- The previous marketing tool used by PBD did not provide A/B testing functionalities so they had to manually analyze performance of email copies and subjects.
- Due to a lack of optimum delivery time, PBD was not able to engage with its customers through email deliveries at the right time.



PETRONAS DAGANGAN BERHAD

OIL & GAS

SOLUTIONS

Telcwin collaborated with PBD to merge and segment customer data using Marketing Cloud (MC), resulting in the creation of multiple targeted audiences.

By streamlining data submission from various sources into MC, PBD gained immediate access to customer data, significantly reducing campaign execution time.

Having successfully segmented customers into different profiles and utilizing the email heatmap, PBD was able to evaluate content performance based on click rates.

Using Email Studio, PBD incorporated multiple links to track customer interests, driving higher engagement in their loyalty program.

Telcwin's recommendation of Einstein Copy Insights empowered PBD to analyze subject copy performance and take appropriate actions.

With MC's A/B Test function, PBD automated the A/B testing process, leading to more efficient measurement of email performance.

PBD's implementation of Einstein Send Time Optimization allowed them to deliver emails to customers at the most optimal times based on their past behavior, resulting in increased email open rates.

APPLICATION



FEATURED PRODUCTS



Service Cloud

Marketing Cloud

ACHIEVEMENTS

-  50% Increase of loyalty campaign product take-up rate
-  17% Increase in open rates
-  2x Faster for campaign execution time from design to blast.



TENAGA NASIONAL BERHAD

UTILITIES

Telcwin has been continuously supporting TNB Retail's GLB team to **increase the usage of Sales Cloud through the "B2B CRM Phase 1 GTM earlier" in Jan 2021** and by enhancing the system to reflect the team's business needs. The data below shows the issues and solutions provided by Telcwin as well as the rate of usage after 6 months.

CHALLENGES

- Lack of system to manage and assist in the end-to-end process
- No self-serve system to provide an end-to-end traceability and visibility on sales leads and progression of opportunities
- Not having a holistic and correct customer profile off a single system

SOLUTIONS

- Enable Marketing automation, Prospect Management , and Qualified opportunity that allow Account Manager to capture the value of interest for beyond kWh Solar solution.
- Enable Qualified Opportunity Management and automate the process to collaborate with the solution team
- Gamified Q&A sessions to increase system uptake by users.

APPLICATION



FEATURED SOLUTIONS

-  Sales Cloud
-  Marketing Cloud
-  Service Cloud

ACHIEVEMENTS

-  **20x** Increase in Prospects Generation for Solar Business
-  **38x** increase in Qualified Opportunity in Solar (226 Qualified working opportunity)
-  **9x** increase in Solar Proposal creation between teams



TENAGA NASIONAL BERHAD

UTILITIES

Telcowin has been continuously supporting TNB Retail's Careline to **increase the usage of Service Cloud**, especially supporting and preparing the Careline team towards the influx of possible cases during Covid-19 pandemic period. TNB Careline also take the first step to embrace full cloud solution using Service Cloud and have build a successful story on **reducing the response time for Social Media Case Management**.

CHALLENGES

- Prior to the pandemic, the turn around time to respond to customer are only during office hour. Response through social media platforms will be route from the analytics team to Careline, hence a longer turnaround time > 4 hours.
- During the pandemic, incoming cases via social media channels increases due to the extended Covid-19 lockdown. There's a need to handle these high volumes of cases faster.

SOLUTIONS

- Enable the connection to automate the social cases and sentiments remodelling from all social channel with Social Studio to Service Console, for swift response, via setup of "Quick Text" responses.
- Customised automations such as time and non-time based, and custom workflow automations were created to capture the efficiency of the agent's First Response Time and Handling Time of each case.

APPLICATION



FEATURED SOLUTIONS

-  Sales Cloud
-  Digital Engagement

ACHIEVEMENTS

-  Decrease Response time expected from **4 hours to within 1 hour**
-  **5% increase in Customer Satisfaction Index Rate in 2021**, which has been stagnant since 2019 (**81% to 86%**)



KUANTAN PORT

DEVELOPER / REAL ESTATE

CHALLENGES

Kuantan Port challenges due to the absence of a centralized platform to streamline and monitor their sales process and performance. With multiple data sources operating in silos, there is a lack of cohesion and efficiency. Without a dedicated platform for internal collaboration, teams struggle to communicate effectively and share important information.

Additionally, the absence of a centralized system for tracking and monitoring the pipeline results in performance and revenue being manually recorded in an Excel sheet, which further exacerbates the lack of visibility into the overall sales performance and revenue generation.

SOLUTIONS

- **Customer 360 View:** To enhance sales and revenue generation, it is essential to adopt a single. This approach enables the measurement of efficiency in completing customer management activities while providing visibility into each customer's account information and interactions with Kuantan Port Consortium.
- **Sales Cloud And Marketing Cloud :** This system will enable efficient tracking and follow-up with customers, ensuring effective communication and relationship management.
- **Reports and dashboards:** These tools will provide valuable insights and facilitate data analysis, enabling KPC to make informed decisions and drive business growth.

APPLICATION



FEATURED PRODUCTS

-  Sales Cloud
-  Einstein Analytics
-  Marketing Cloud

CUSTOMER'S FEEDBACK



MSM MALAYSIA HOLDINGS

SUGAR MANUFACTURING

MSM operates the sugar business of FGV Holdings Berhad (formerly known as Felda Global Ventures Holdings Berhad). It produces, markets and sells refined sugar products through two operating subsidiaries, MSM Prai Berhad and MSM Sugar Refinery (Johor) Sdn. Bhd. MSM also operates a logistics company - MSM Logistics Sdn. Bhd. One of its core principle was harness a higher level of digitalization, data analytics and cloud usage in business operations towards greater adoption of Industry 4.0 application features and infrastructure.

CHALLENGES

- Lack of visibility over the activities of the reps through Ticket tracking and follow up activities
- Manual use Reports and analysis to measure customer satisfaction and case solved (efficiency)
- Time to solve the issues take approximately 2 to 3 days and manual tracking using excel
- On premise CRM that lack efficiency and accessibility to operational level which harden the process of tracking and checking on its asset management during sugar return procedure.

SOLUTIONS

- Service Cloud as its core ticketing process which accessible by its main operational level to ease the process of ticketing and sugar return procedures.
- Connection with the M3 Source System to enable Account referencing during Purchase Order and Sugar Return procedure
- Connecting to Social Media platform to ensure more channel coverage
- Automated process via Flow to fasten the ticking and follow up action
- Real Time Report and Dashboard for the usage of operation and MSM Board member.

APPLICATION



FEATURED SOLUTIONS

-  Service Cloud
-  Digital Engagement

ACHIEVEMENTS

-  Reduce Average Handling Time by 20% on sugar return procedures
-  30% increase in operational efficiency compared to manual processes

CUSTOMER'S FEEDBACK

“Overall we are satisfied with their capability in CRM, quickly understand our requirement and able to provide required solutions. They also having product knowledge.”



GSPARX SDN BHD

UTILITIES

Gsparx is a green energy solution provider offering end-to-end solutions from consultation, installation, maintenance, and monitoring. Their aim is to provide the best commercial and technical solutions tailored to serve your needs.

Gsparx is now a TNB Subsidiary company.

CHALLENGES

Gsparx receives a lot of immature leads and finds it difficult to allocate time to sales-ready customers which led to a decrease in productivity.

Additionally, there was no standard sales process among the sales team which made forecasting of pipelines very difficult.

They had difficulty in getting opportunities inline between their partners and relevant team members.

Another challenge was increasing Gsparx's ancillary revenue as they did not have a deep understanding of their customers

SOLUTIONS

- With Pardot and Sales Cloud, Gsparx was able to get a 360° view of every opportunity and better understanding of its customers requirement which was shared with every team.
- Sales Cloud also brought greater efficiency and structure to their sales pipeline by streamlining their sales process.
- Pardot provided an automated nurturing process which assigned hot leads to the appropriate sales rep. This increased the overall close won rate and productivity of the marketing and sales team.

APPLICATION



FEATURED SOLUTIONS



Sales Cloud



Pardot



WHY TELCOWIN



WHY CHOOSE TELCOWIN

Customized Solutions

We take the time to understand your unique business needs and develop solutions that are tailored to your specific requirements..



Customer Service

We are committed to providing exceptional customer service, from initial consultation to ongoing support and training.



Expertise

Our team of experienced professionals has years of expertise in the industry, ensuring that we deliver the best possible results and stay up to-date with the latest innovations.



Local Knowledge

With our deep understanding of the Malaysian business landscape, we are uniquely positioned to help businesses in Malaysia achieve their goals and grow their bottom line.



WHY NOW IS THE TIME TO INVEST

01

ENHANCE YOUR BUSINESS EFFICIENCY AND OUTPERFORM YOUR COMPETITORS

Salesforce platform are designed to **streamline your operations** and consolidate your data, resulting in a **significant boost in productivity and efficiency**.

With our proven strategies, you can **optimize your workflow and gain a competitive edge** in your industry, paving the way for sustainable growth and success.

02

TRANSFORM YOUR CUSTOMER SERVICE EXPERIENCE

Salesforce solutions offer valuable insights into your customers' needs, enabling you to personalize your services and build lasting relationships.

With our expertise, you can **optimize your customer service process** and **increase loyalty, retention, and revenue**.

03

UNLOCK BUSINESS INSIGHTS AND DRIVE GROWTH

Our analytics tools offer **advanced capabilities** to help you gain a deeper understanding of your business operations.

With our expertise, you can **make data-driven decisions and optimize your strategies** for maximum growth and profitability. Let us help you **uncover hidden insights and unleash the full potential of your business**.



Introduction to DocuSign IAM

Updated: April 11, 2024

DocuSign IAM

Future-Proofing Your Agreements

Jabatan Digital Negara (JDN)



**Channel Resell Director,
Philippines, Malaysia, Thailand**



DocuSign Public

Partners Team



Eason Wang
Channel Resell Director
Philippines, Malaysia,
Thailand

Sales Team



Ying Zheng Ong (YZ)
Account Director
Malaysia



Ilma Fadzal
iCAM
Malaysia

Solutions Consulting



Ai Ling Chen
Principal Solution Consultant
Philippines, Malaysia, Thailand

Renewals team



Michael Olegario
Senior Manager
Renewals, ASIA

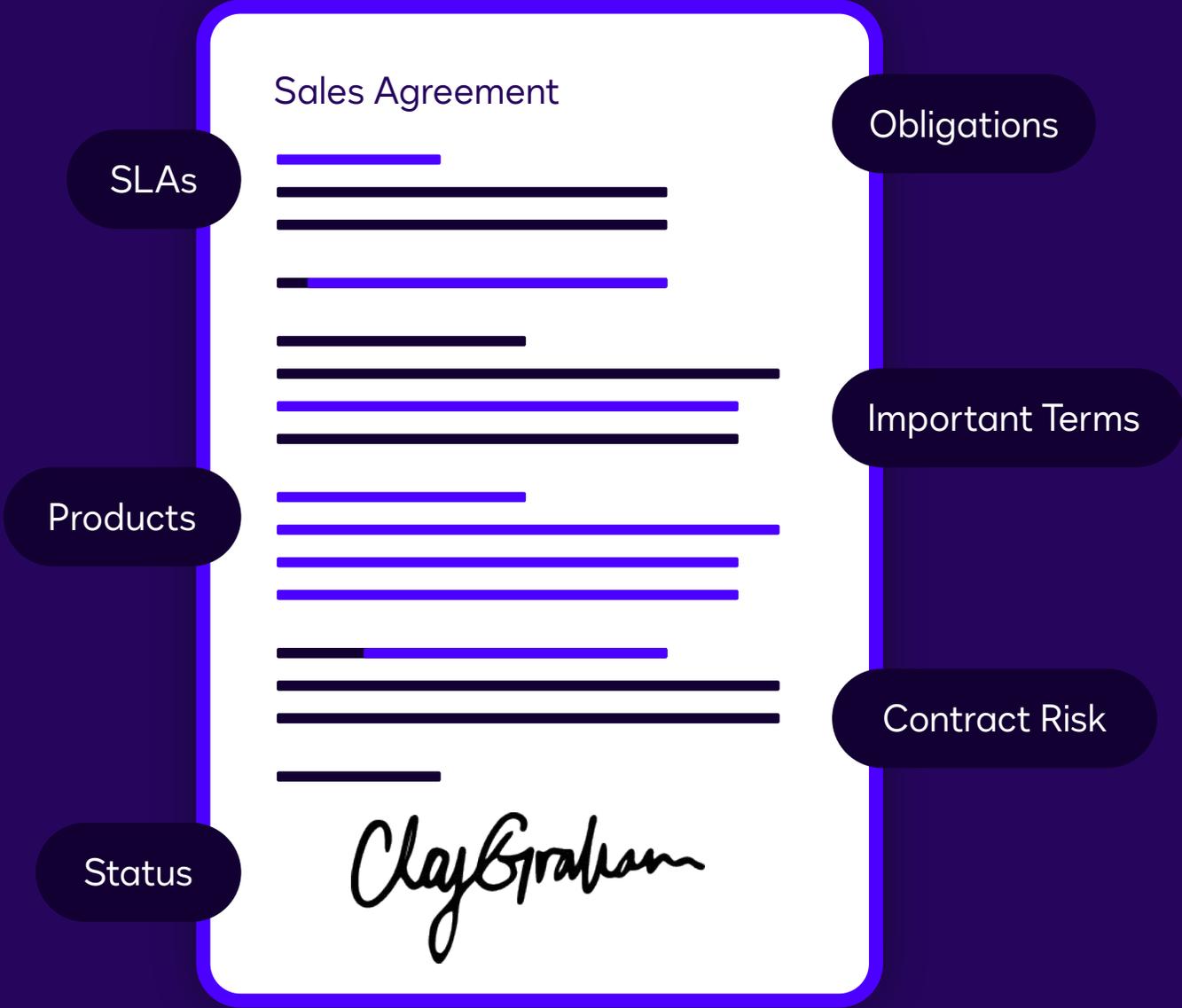
****Several RM reporting
to Michael***



Malaysia Team

The world runs on agreements

Over \$90 trillion of global B2B economic activity relies on agreements each year



Agreements exist in every function, in every organization

Sales

Sales Contracts
NDAs
SOWs

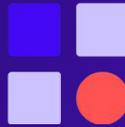


HR

Offer Letters
Background Checks
Company Policies

Service

Field Service
Change Orders
Work Agreements



Procurement

Vendor Contracts
Purchase Orders
Termination Letters

Marketing

Vendor Agreements
Sponsor Agreements
Influencer Agreements

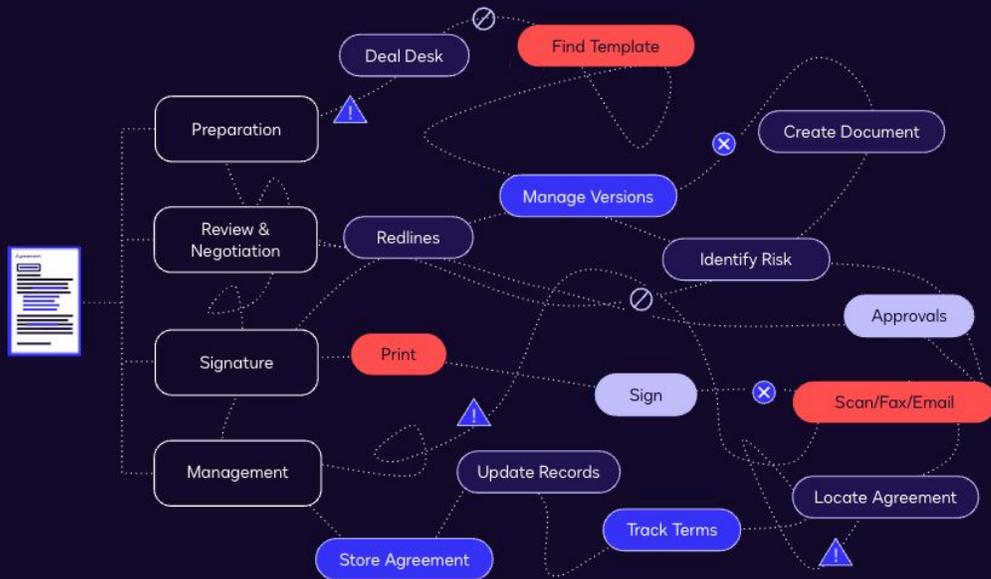


Legal

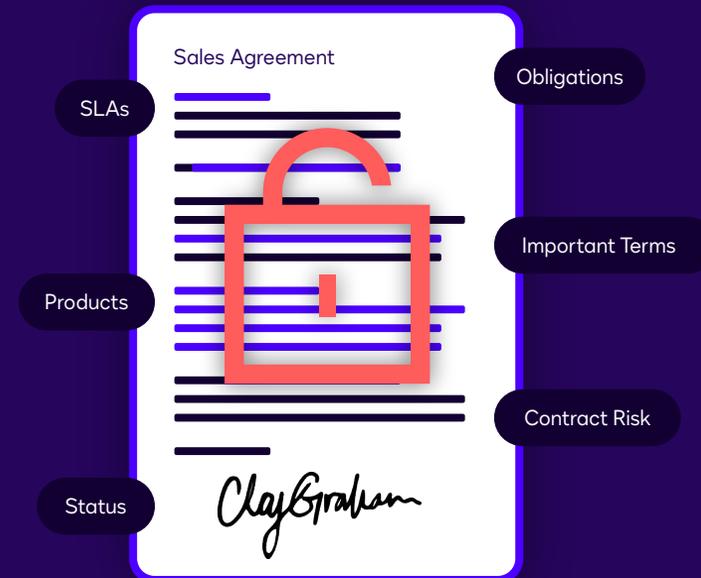
Amendments
Affidavits
SEC Filings

However, the way agreements are managed is broken

Disconnected Systems & Processes



Inaccessible Data



We call this The Agreement Trap



The Agreement Trap destroys value for your business

Sales

Sales velocity slows, deals slip, and revenue is lost

Procurement

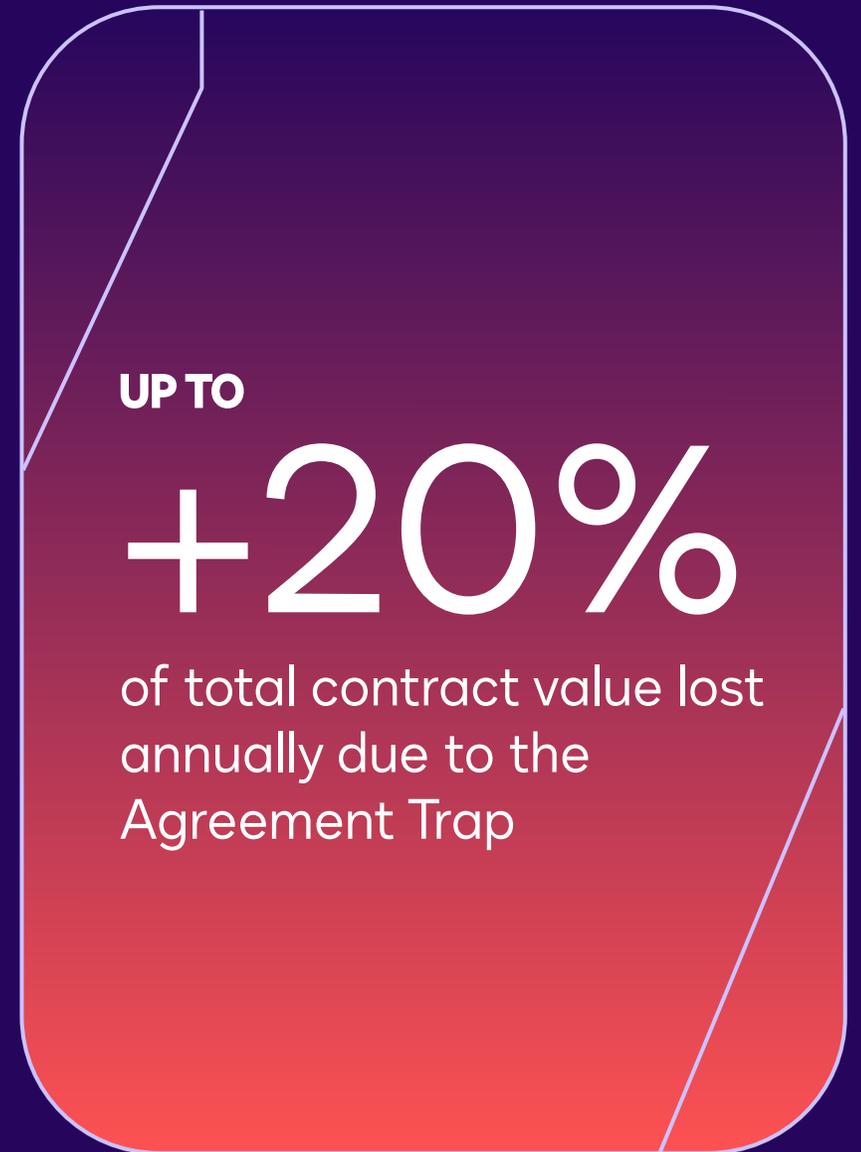
Value erodes as terms, SLAs, and obligations remain buried in flat files

Legal

Teams struggle to keep pace and lurking risks go unidentified

HR

Top talent is lost at the finish line to more nimble competitors



Source: Deloitte

We believe in a new way of managing agreements

Agreements must be first-class participants in your business processes

Agreement data must be automated & connected to your workflows and systems

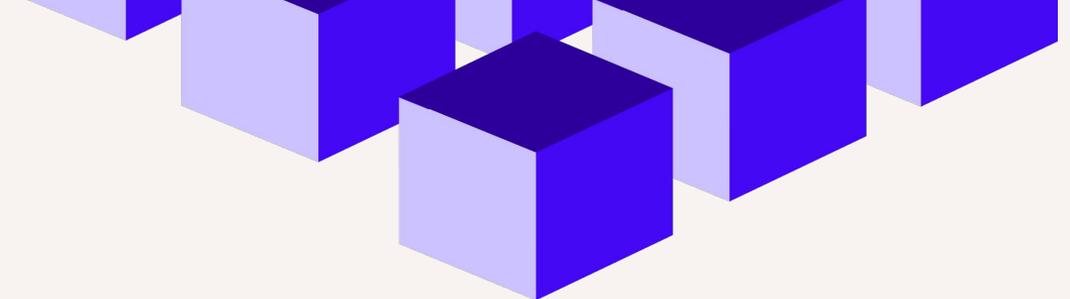
Your functional leaders should be empowered to activate agreement data

Our Solution

IAM

Unleashing the value of agreement data
to power every company





Create

agreements in accessible,
collaborative, & more
automated ways

Commit

to agreements &
relationships on a trusted
platform

Manage

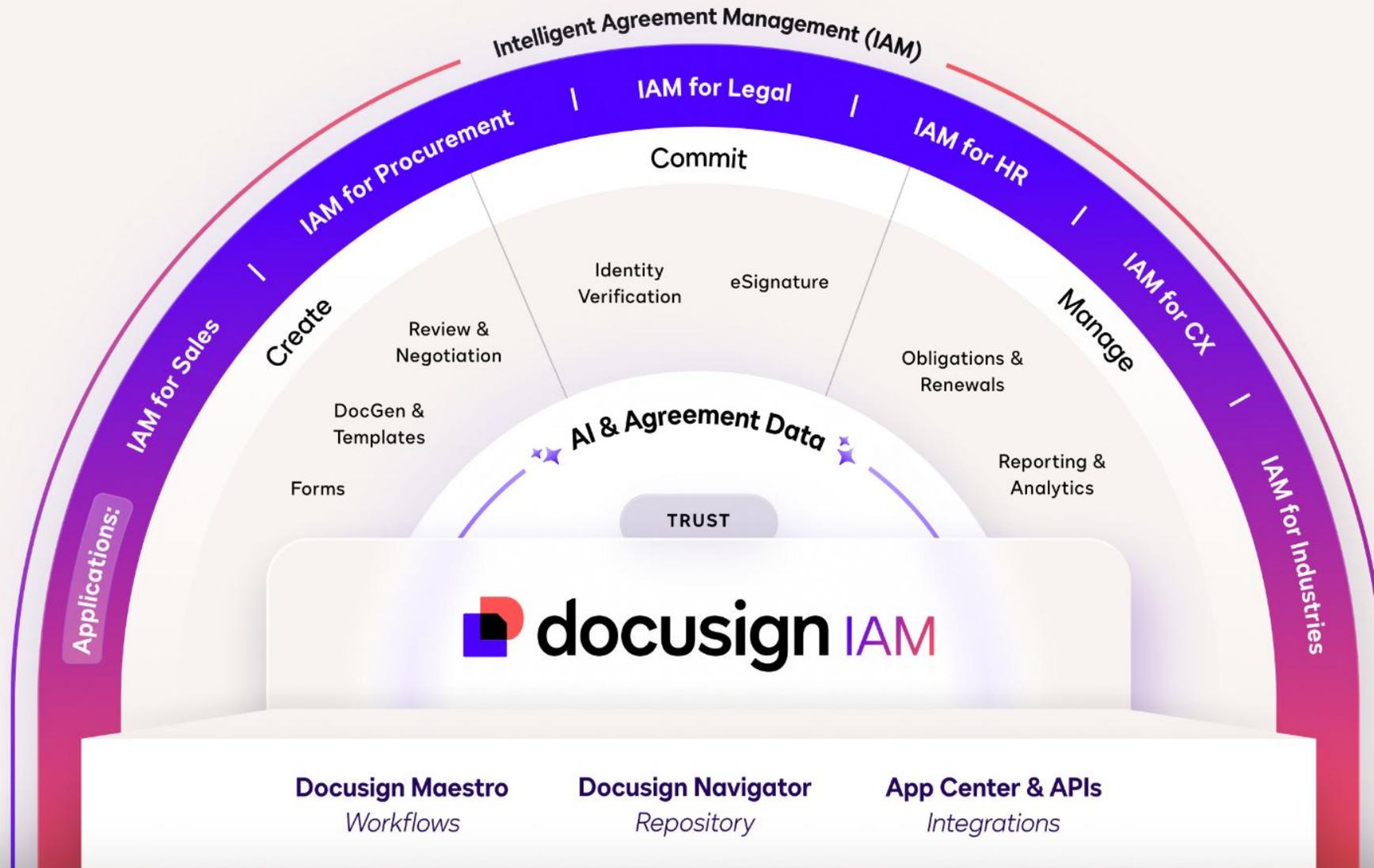
agreements seamlessly in
ways that connect to your
other systems



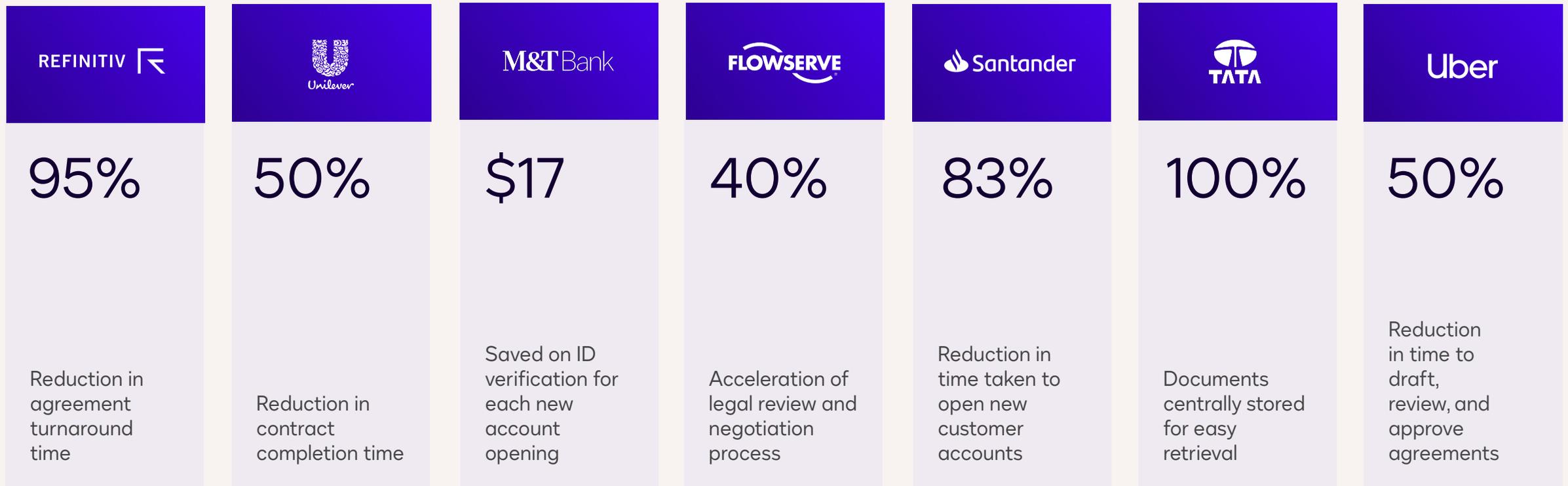
Introducing
DocuSign IAM.

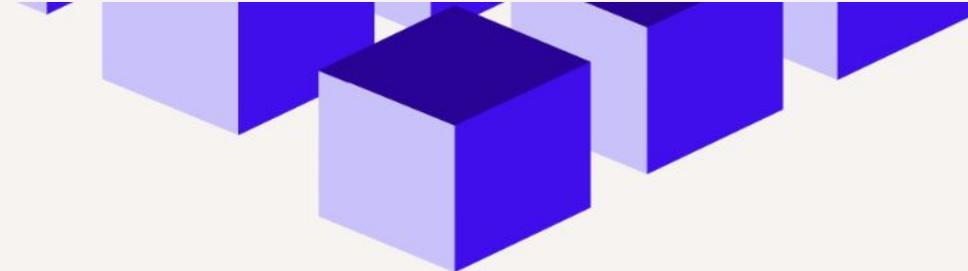


DocuSign IAM / Transform the way you agree



DocuSign helps customers across every industry with end-to-end Intelligent Agreement Management





62%

of companies

Companies **struggle to identify** specific agreement language or clauses, significantly delaying agreement creation

2x

lost deals

Companies **lose up to 2x** more deals due to poor agreement processes and experiences

47%

of companies

Companies **struggle to track** and analyze past agreements, leaving them ill-prepared for negotiations

Source: Deloitte & Docusign Digital Agreement Management Study, 2024

Docusign Confidential

Common Reasons Why Enterprises Choose DocuSign

Microsoft Users

- DocuSign has **strategic partnership with Microsoft**. We have extensive Microsoft apps integrations
- Your customers can easily digitize entire contract value chain from **Office 365, Dynamics 365, SharePoint, Copilot** and more.



BioTech/Health Life Sciences Industry customers

- Customers that require FDA compliance in their digital signing **need 21 CFR Part 11 module**
- DocuSign is one of the few vendor that **support 21 CFR Part 11 modules** and **serves 14/15 top HLS customers globally**



Embedded API Signing

- Customers that is **building workflow solution** to collect end-user data and signature from their own web/mobile app through API
- Our **award winning API** help FinTechs to integrate DocuSign into their mobile for faster loan approval



Global Enterprises

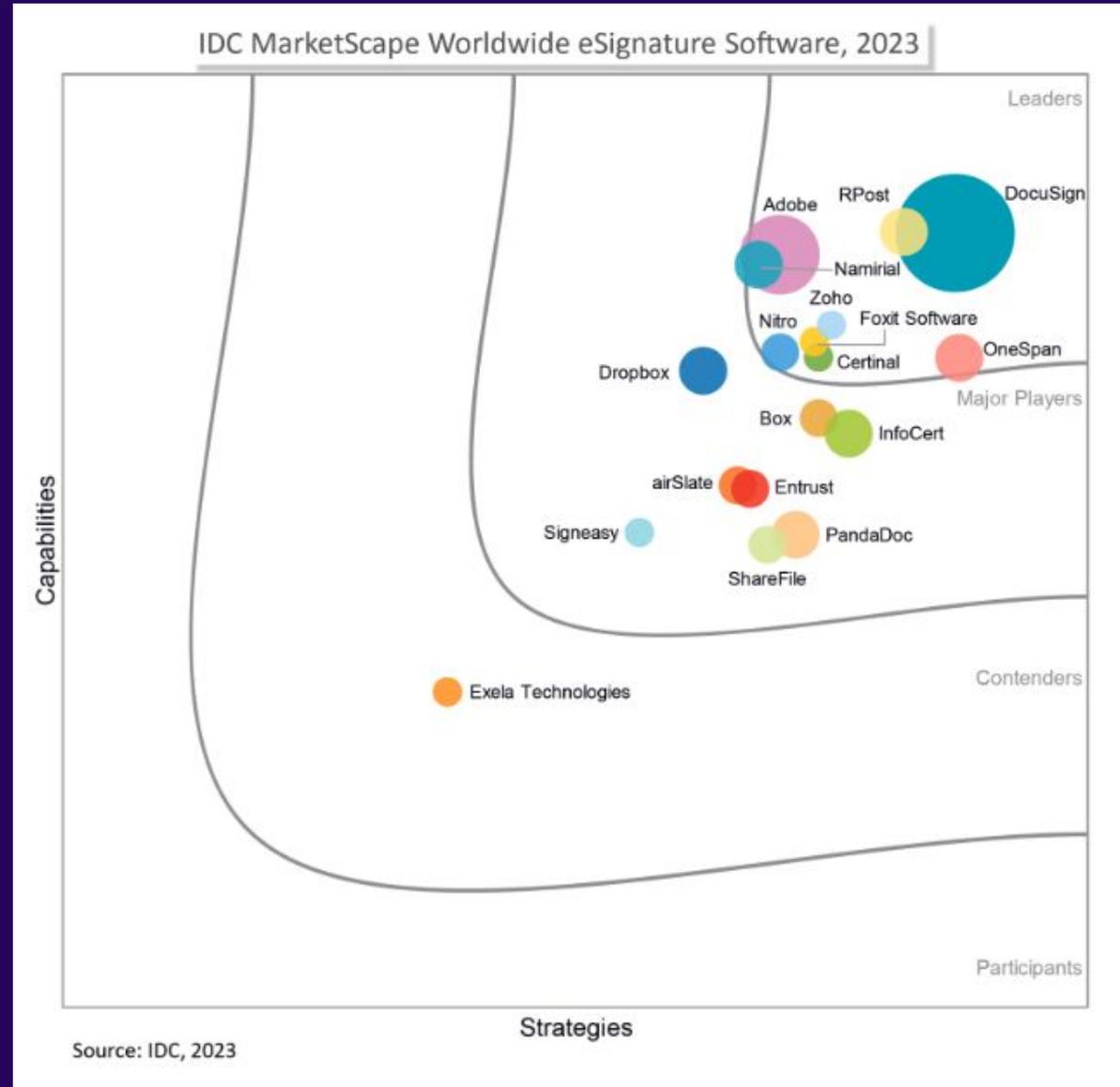
- Your customers with **global offices** need a standardized agreement solution that can be **trusted and scale globally**
- **DocuSign is a category leader** for agreement solutions trusted by Wipro, Infosys, and more



IDC MarketScape Worldwide eSignature Software, 2023

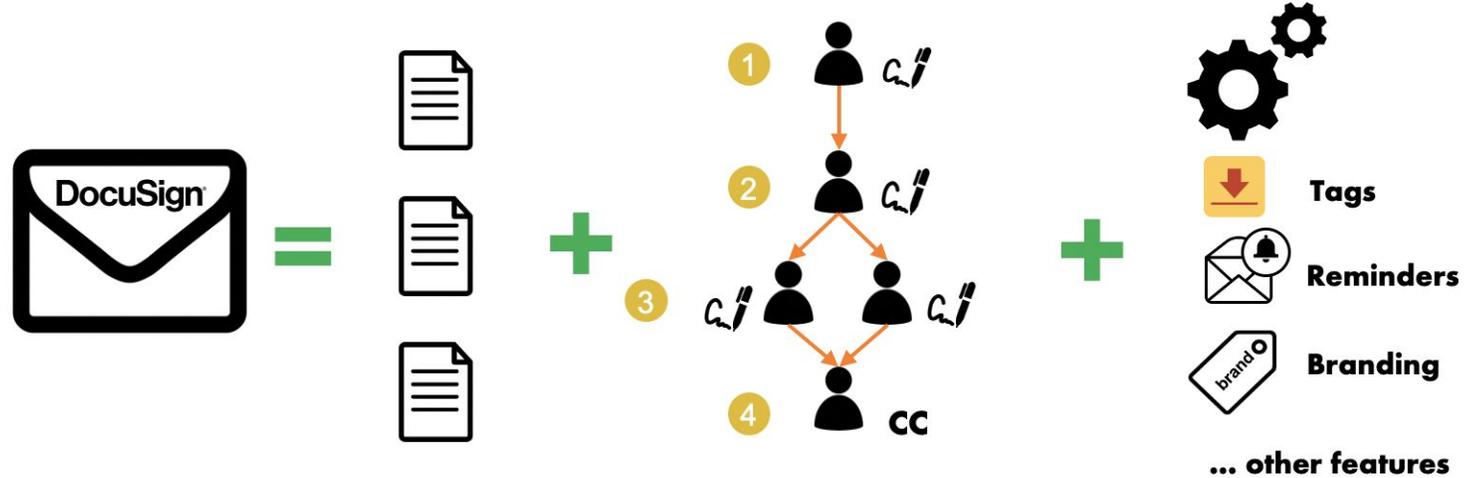
Why DocuSign stands out from the competition:

- **DocuSign** offers customers a complete portfolio of solutions across the agreement value chain
- **DocuSign** delivers features to facilitate the signing process across all types of agreements, including highly regulated digital signatures, and deliver faster time to value
- **DocuSign** is leveraging generative AI and large language models to highlight key terms on mobile devices and to summarize longer agreements



DocuSign eSignature Demo

What's an envelope?



A Leader in CLM

For the **fourth** year in a row, DocuSign CLM was named a 'Leader' with our **best result** to date

#1 in the Salesforce Ecosystem:

Gartner recognized our continued leadership in the SFDC ecosystem, citing it "...goes beyond traditional CRM integrations. One example is integration with Slack..."

AI and Advanced Analytics:

"DocuSign Insight is one of the most mature contract review and analysis solutions on the market."

Innovation:

Our investments in Clause.io, Blackboiler and other startups "drive significant advantages in understanding and defining the future of CLM"



Source: Gartner (October 2023)

DocuSign CLM Demo

DocuSign®



DocuSign CLM

Handle all your document centric needs in one place

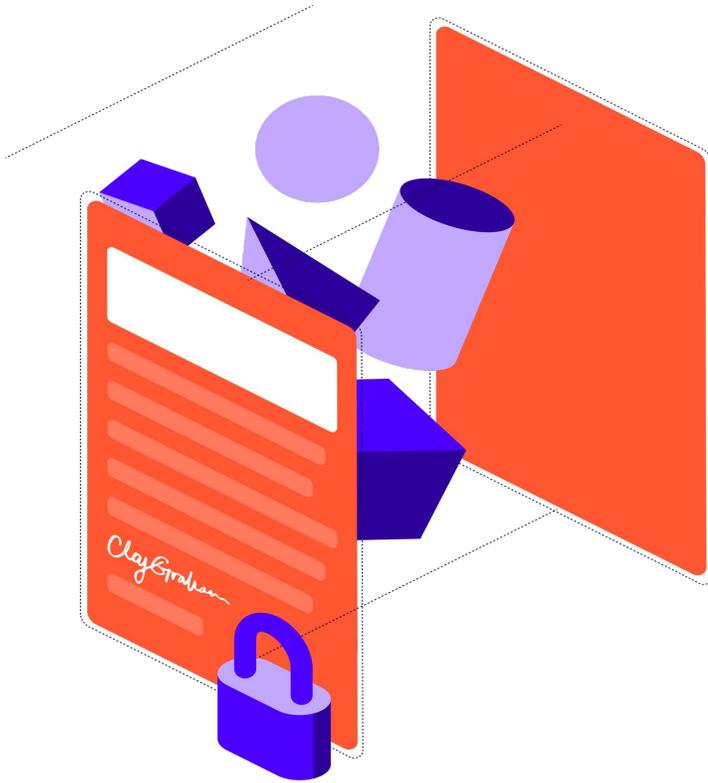
Steven Cooke
Solutions Engineer

DocuSign AI

57

**95% of companies say
integrating CLM and
contract analysis into
one platform is important**

DocuSign AI transforms static documents to dynamic assets with AI capabilities you can **trust**



59

DocuSign AI helps you unlock agreement value

Accelerate contract reviews

Auto-tag dynamic fields for quick agreement preparation with **Field assist in eSignature (web/digital only)**

Trigger workflows with AI insights to eliminate bottlenecks with **Smart automation in CLM***



Boost productivity across the organization

Simplify complex agreements into key details with **AI-powered data extractions in CLM* & Navigator** and **Summarization in AI Extension for CLM**

Easily locate agreements, key dates, and terms with **AI-powered data extractions in CLM* and Navigator**



Drive business decisions with agreement insights

Proactively identifying risks like deviations from company guidelines with **Risk assessment in CLM+**

Uncover opportunities with streamlined renewal tracking with **Renewal management in Navigator**

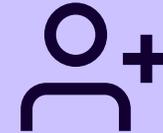
Optimize contractual commitments with **Obligation management and Custom reporting in CLM+**

DocuSign AI Differentiators

eSignature plans, IAM
applications & CLM



**DocuSign AI
assists the
end-to-end
agreement
process**



**DocuSign AI
scales to serve
customers of all
sizes**

Third Party vs. Proprietary Models



Third Party Models

- Provided by external organizations
- Accessed via APIs
- Often less specialized



Proprietary Models

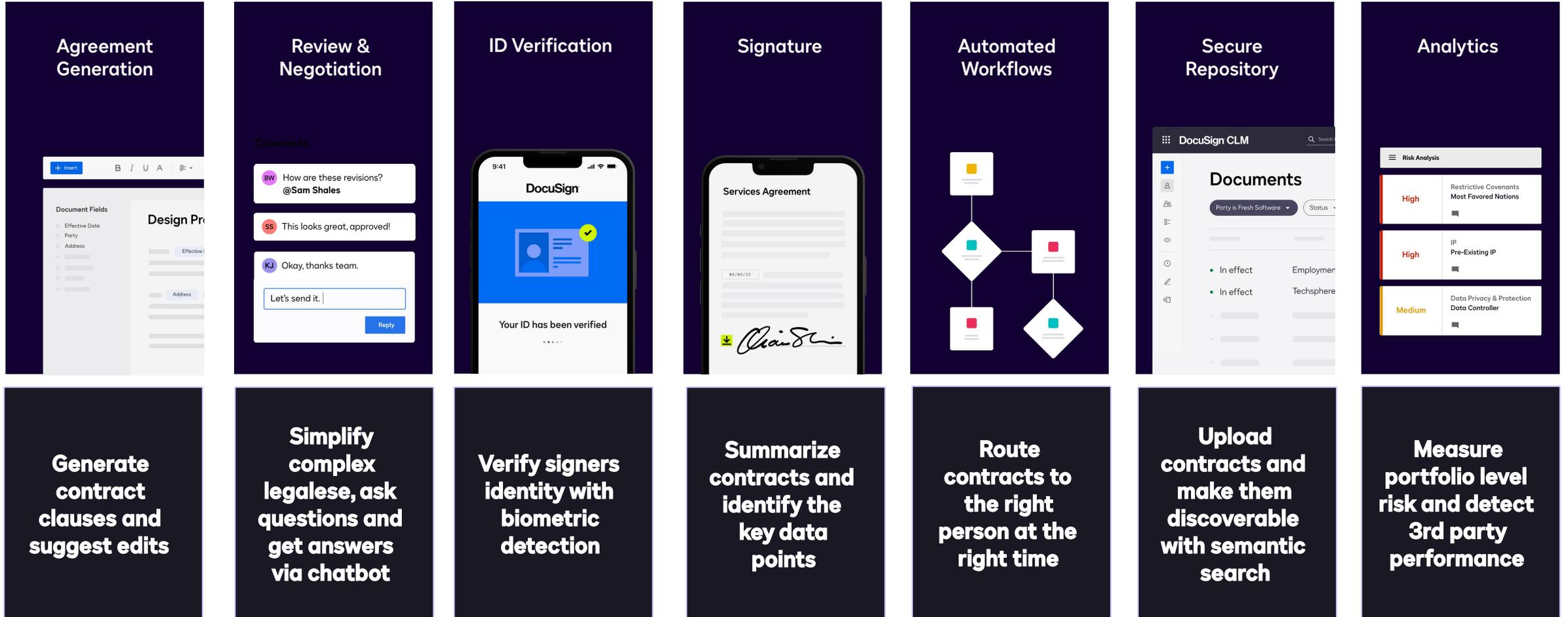
- Developed in-house
- Can be highly specialized using training data

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DocuSign uses a hybrid approach of third party models (Azure OpenAI) and its own set of proprietary models that are specialized for agreements.

Where does AI Matter Across the Agreement Lifecycle

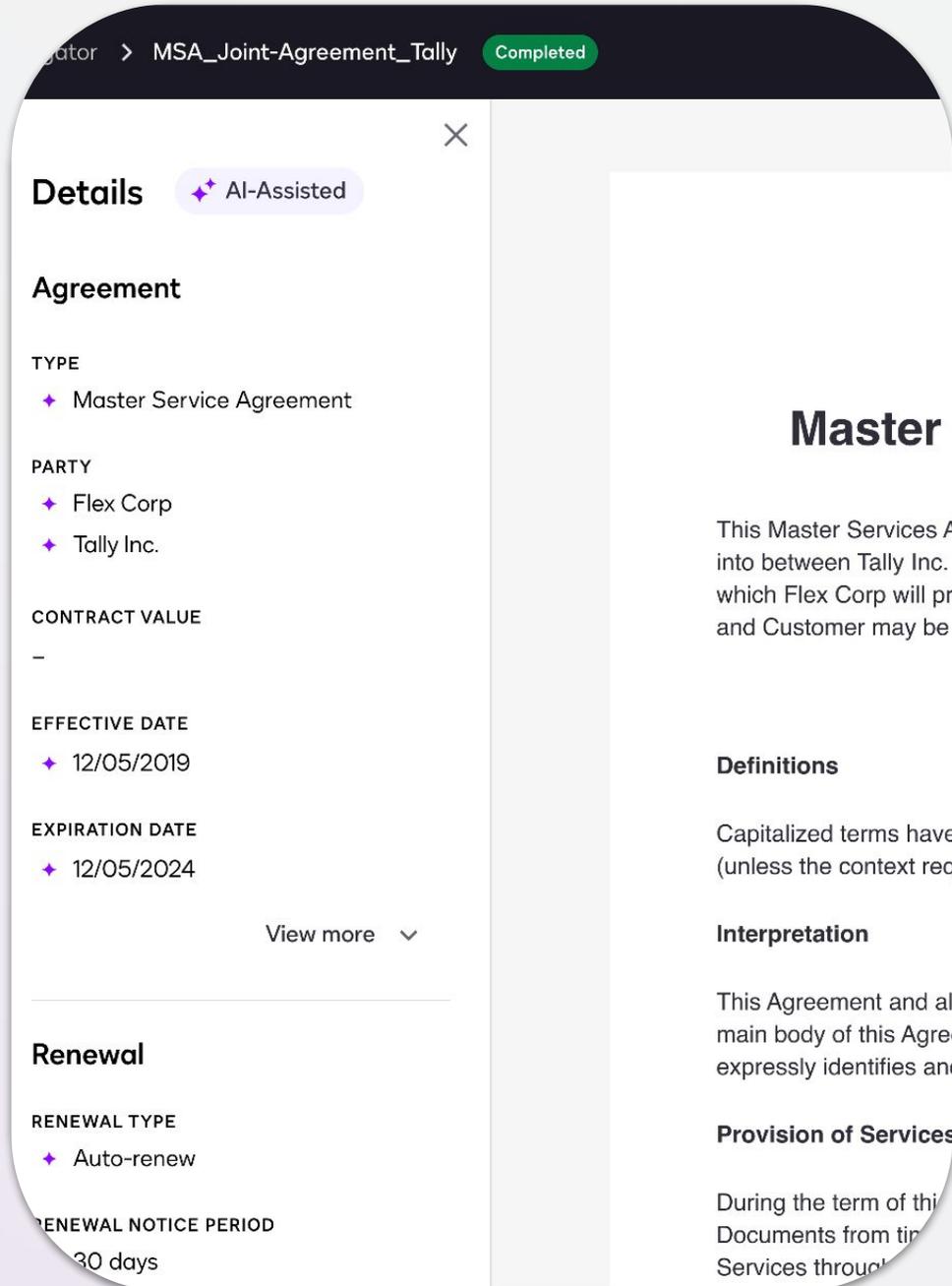
AGREEMENT PROCESS



AI-powered data extractions in Navigator

✓ Drive business decisions with agreement insights

Rely on DocuSign AI to identify and store attributes associated with your agreements, so you can standardize agreement data and facilitate better reporting for decisions.



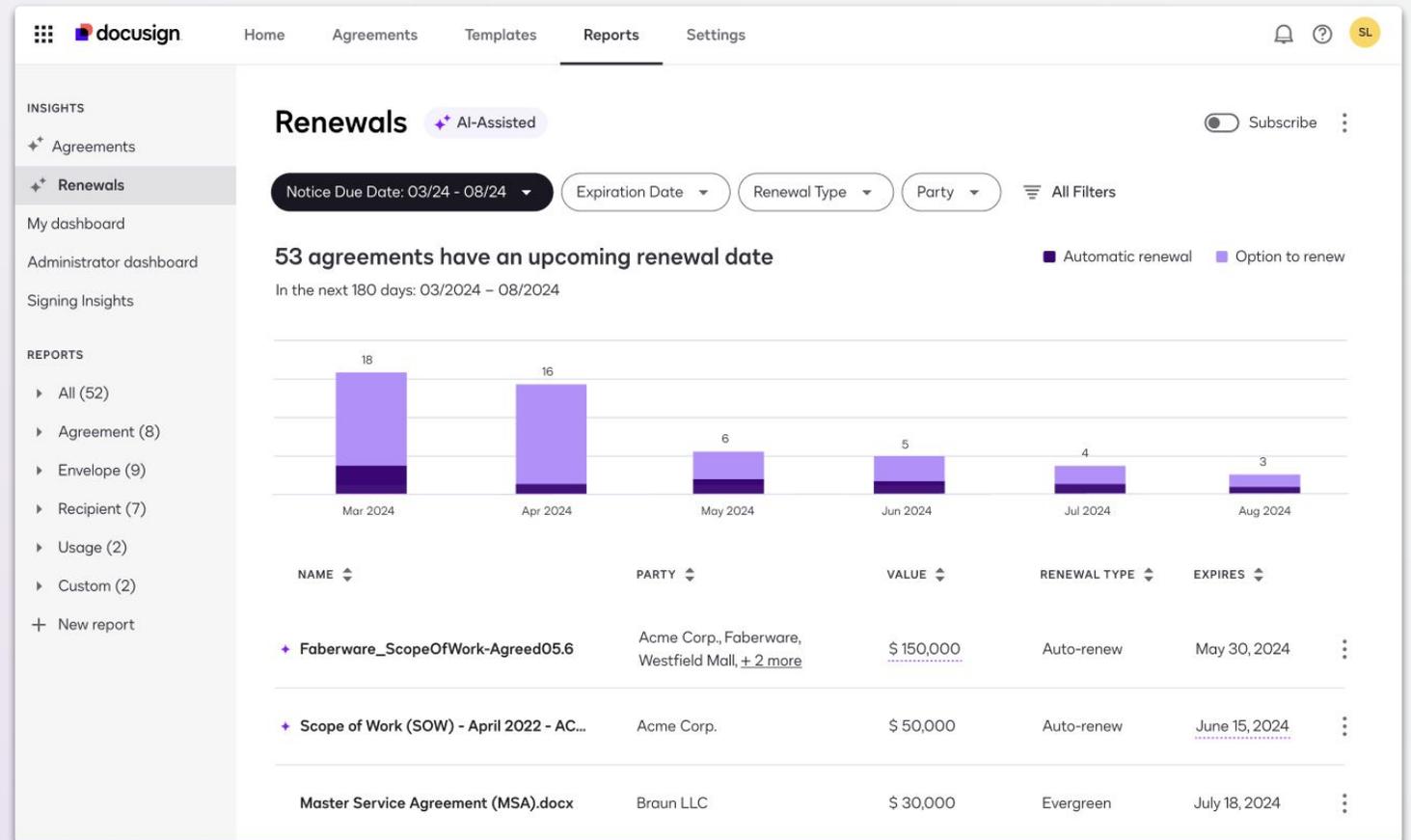
Available in US only for IAM Core & IAM for Sales

Renewal management in Navigator



Drive business decisions with agreement insights

Access a renewal dashboard and subscribe to agreement reminders so you can uncover opportunities to cut costs and avoid unwanted auto-renewals.



Available in US only for IAM Core & IAM for Sales

Search for Agreements

DocuSign Navigator

 docuSign university

FY25 Global Product Roadmap Summary



Create

Dynamic tables for Doc Gen for eSignature
 API-based Web Forms initiation and embedding
 Read and pre-fill data from 3rd party SORs for Web Forms and eSignature

Commit

ID Verification for FINTRAC compliance
 Basic Data Verification (Email, Phone, Address) ^{Beta}
 AI-assisted signer search
 SBS Workday support
 Premium Data Verification (Bank Account, SSN, Business ID) ^{GA(US)}
 AI Summarization
 Google Docs integration ^{GA (US, CA, AU)}

Manage

Digital Signature, IDV usage and upcoming renewal reports
 Docusign Navigator ^{GA (US)} (bulk upload, comprehensive search, renewal management and automated reminders)
 Microsoft Copilot for Sales integration
 Modernized CLM search
 Smart Upload Center
 Renewal management & notifications ^{GA (US)}

Platform & Apps

IAM for Sales ^{GA (US)}
 IAM for CX ^{GA (US, CA, AU)}
 Docusign Maestro ^{GA (US, CA, AU)}
 Docusign App Center ^{GA (US, CA, AU)}

Agreement Template Builder
 Suggested fields with autoplace
 Web Forms and Advanced Web Forms enhancements
 Power Automate advanced functionality
 Maestro for CLM
 AI-assisted contract review ^{EAP}

Notary Connect
 Identity Wallet for ID Verification
 Self-service Identify setting in Radmin
 Basic data verification ^{GA (ROW)} & Web Forms and Maestro integration
 Premium data verification ^{GA (CA, AU, UK, FR, DE)}
 CLM comment syncing

Microsoft Copilot for M365 integration
 Docusign Navigator ^{GA (US)} (party hub, obligation management and Cloud Storage Upload)
 CLM connector for SAP Ariba
 Obligation management expansion ^{GA (US)}

IAM for CX ^{GA (Rest of world)}
 Docusign Maestro ^{GA (Rest of world)}
 Docusign App Center ^{GA (Rest of world)}
 Docusign App Center multiple connections
 Docusign App Center Salesforce extension
 Workflow templates and advanced conditionality in Docusign Maestro

Document Template Library
 Data standardization
 Dynamic document assembly

Standalone Identity Wallet creation
 Multi-channel delivery enhancements

Docusign Navigator ^{GA (AU, CA, UK, FR, DE)} (bulk upload, comprehensive search, renewal management and automated reminders)
 Docusign Navigator ^{GA (US)} (rule-based agreement access, rule-based notification, party hierarchy, Integrations (CRM, ERP, APIs))
 Navigator for CLM ^{GA (US, AU, CA, UK, FR, DE)}
 CLM Migration to Azure
 CLM Party hub

IAM for Sales ^{GA (AU, CA, UK, FR, DE)}
 IAM for Procurement ^{Beta}
 Custom Data Verification

Available now

June 2024 - September 2024

October 2024 - January 2025

You need a partner that makes your process...

Industry-leading innovation

Smarter

Purpose-built applications built for line of business users to transform agreements.

Improve business results with **agreement automation and analytics**.

Use **pre-built or configurable AI** to understand your business better.

The simplest way to agree

Easier

Send and sign agreements from **virtually any device** with our highly rated apps.

World's largest team of agreement experts, focused on your success.

Work in the systems you use already with **900+ pre-built integrations & APIs**.

Experienced, secure, and reliable

Trusted

1.5 M+ customers, 1B+ signers, and **millions of daily transactions** around the world.

Security certifications like **FedRAMP, GDPR, BCR, ISO27001, SOC II** and more.

Architected to provide **99.9% uptime** for eSignature.

The secure way to agree



Purpose-Built Security

- Proactive Threat Detection
- 24/7 Activity Tracking
- Full Operations Visibility
- Enhanced ID Verification



Reliable and Resilient

- 99.9% Uptime for eSignature
- Built-in Redundancy
- Millions of transactions daily
- Real-Time Visibility and Support

Uncompromising standards



AICPA / SOC



ISO27001:2013



CSA STAR Program



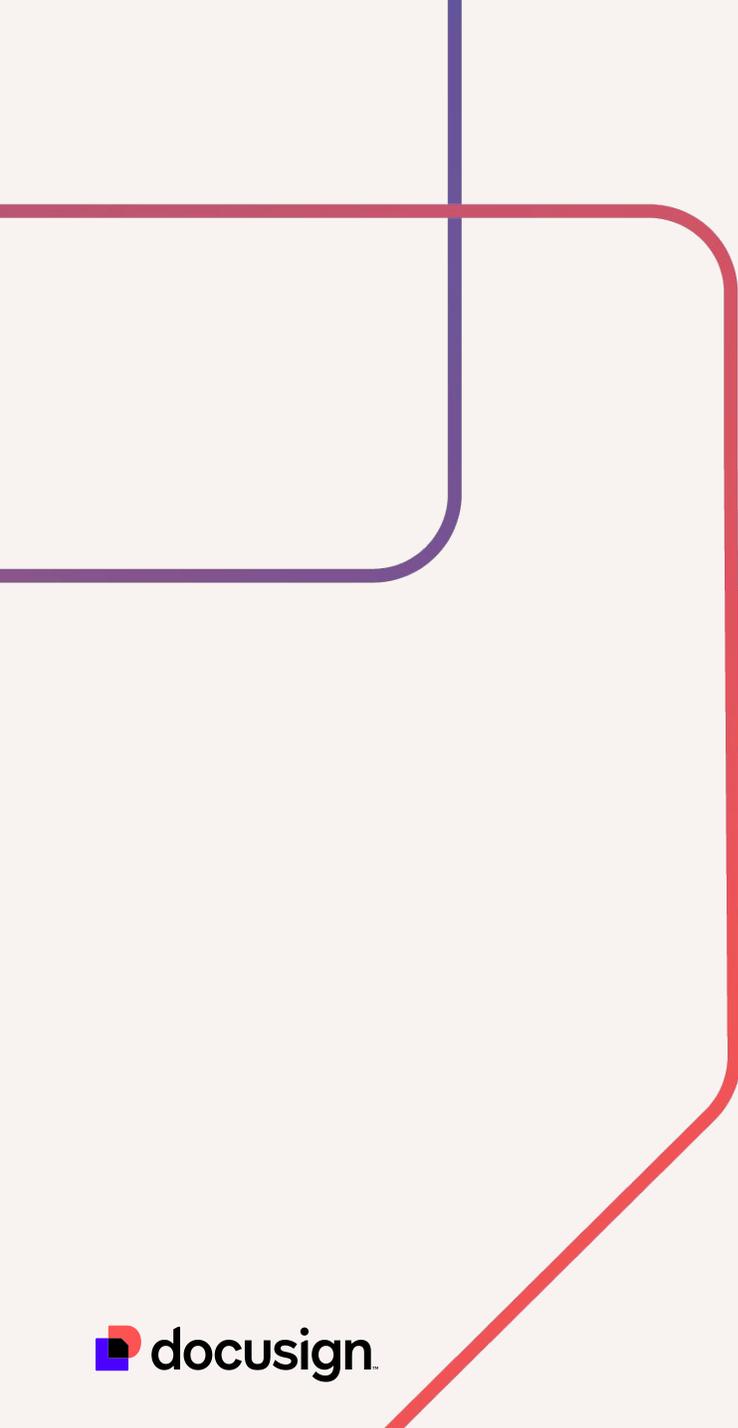
PCI DSS



APEC PRP



DocuSign BCR



Customer Stories & Use Cases

70

Better experience leads to **real, tangible benefits**

DRIVA

“ With Docusign, we’ll continue finding new ways to **shave inefficiencies off our processes** so that we can handle more business with a similar-sized staff.

Michael Ko,
Head of Product

- **3% higher conversion rate**
- **7 min saved per application**

Santander

“ Collecting signatures while matching front & back offices processes enables us to **offer a CX that outperforms even digital-first** banks.

Jonathan Holman,
Head of Digital Transformation

- **83% less time to open account**
- **10x more processed/month**

Domain

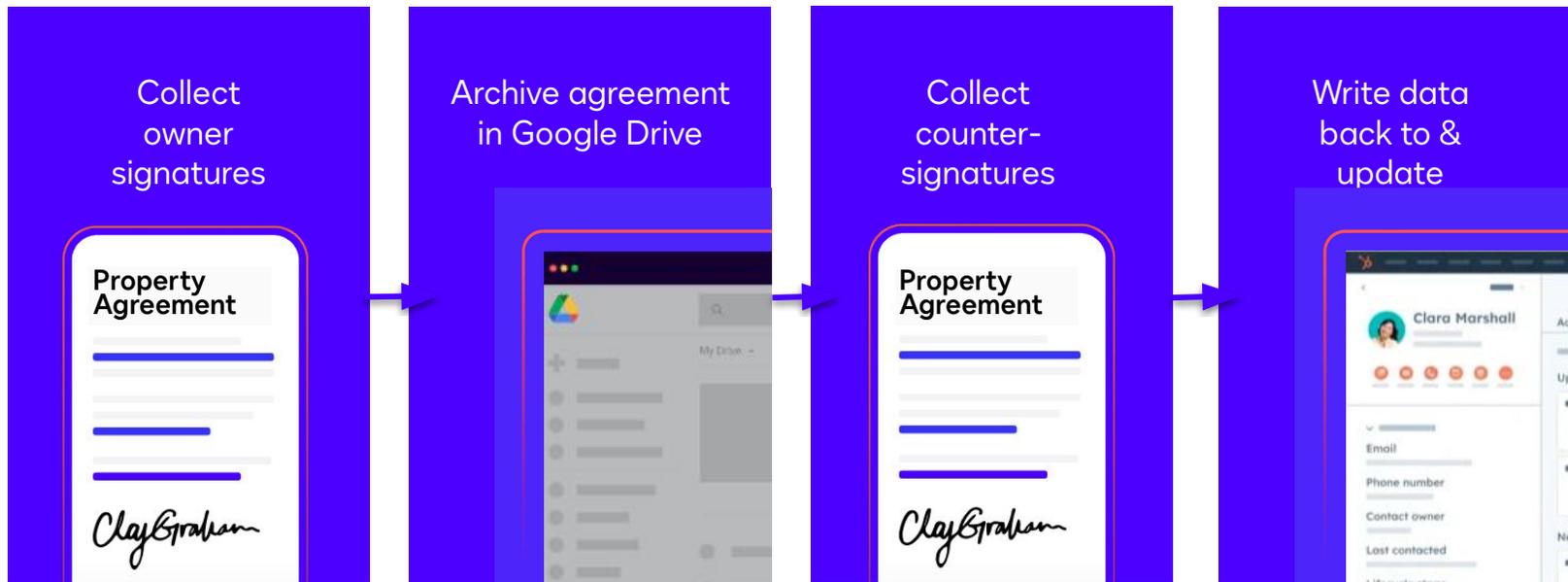
“ [Docusign] allows us to **change our product offering, create GTM plans, and promote products** in alignment with desired outcomes.

Chelle Brown
Sales Communications Manager

- **48 hrs reduction in SLA response**
- **140+ contracts automatically delivered/day**

Use Case: Customer Onboarding

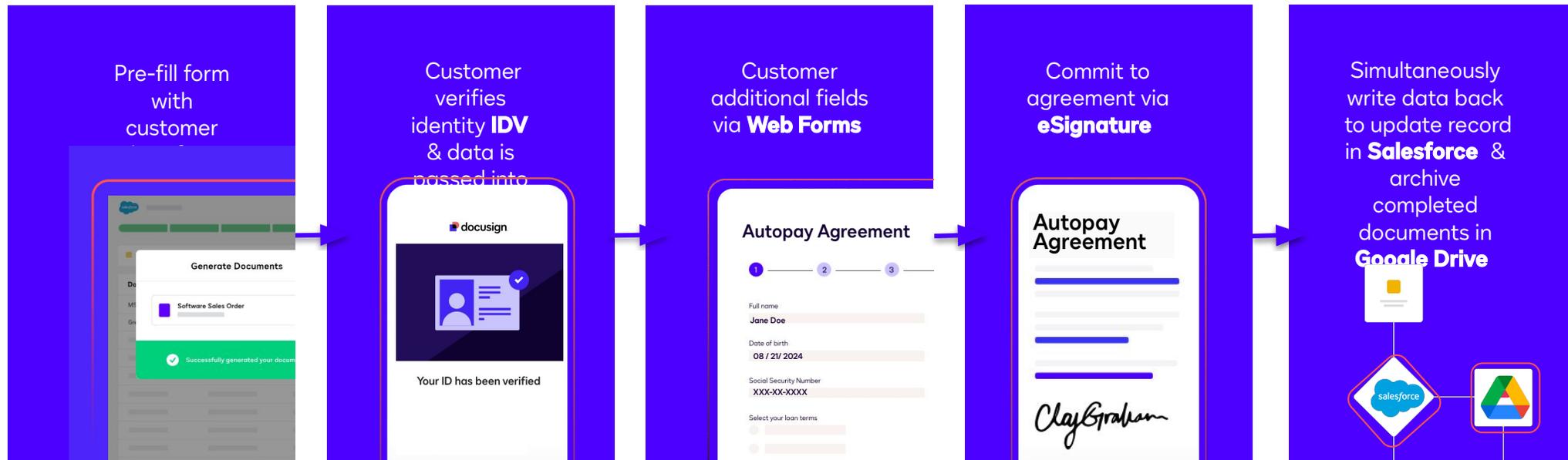
Onboard property to rental ecosystem



Convenient | Integrated | Scalable

Use Case: Membership + Automatic Payments

Setting up automatic payments



Automated | Flexible | Secure

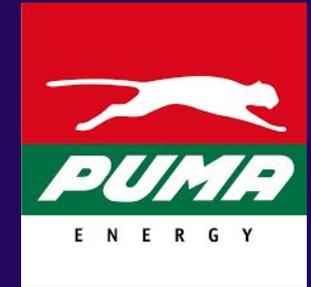
Prasarana Malaysia Berhad

- ✓ All External / Internal Contracts
- ✓ Integration with Microsoft 365
- ✓ SSO integration with Azure AD



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Puma Energy standardize global contract review process



Challenge

Puma Energy was using ContractPodAi CLM across their legal team sitting in different countries globally. Due to the app being a OOTB solution and no native eSign integration, Puma Energy's Legal Team was not able to fully rely on ContractPodAi to improve their legal process, instead having to manually workaround based on what the app can do. Resulting in low adoption and frustration

Solution

Puma Energy rolled out DocuSign eSignature and CLM with Salesforce integration. Their procurement and sales team were able to flexibly custom the CLM to collaborate with legal team more effectively based on their contract workflow end-to-end from contract generation, negotiation, and execution.

Products

DocuSign eSignature
DocuSign CLM

80% Fewer manual interventions

50%

Reduction in time spent on negotiation from procurement, sales and legal team



Significantly reduced contract completion time

Integrations

Salesforce®

Nissan automates their quote and contract processes



Challenge

Nissan had a DocuSign eSignature in place to manage signing workflow for sales documents, but sales reps and legal team still struggled to get documents approved timely due to complex internal workflow for legal review request. Negotiations were slow and painful, and getting completed contract data where it needed to be was manual and error-prone. Resulting back & forth between multiple parties and countless email exchanges.

Solution

Nissan rolled out DocuSign eSignature and CLM for Salesforce Sales Cloud and CPQ. They were able to absorb the two companies' agreement processes, creating complex custom quotes with a click, send them out, and get through redlining and negotiation easily, without ever leaving Salesforce. All while tracking status along the way.

Products

DocuSign eSignature
DocuSign CLM

75%

Fewer manual interventions

80%

Reduction in time spent on negotiation from sales and legal team



Significantly reduced developer support needed to create complex workflows

Integrations

Salesforce®

“DocuSign has made us so much more nimble and able to adapt to change, and we’re looking into new ways to innovate with them across the whole business even outside of the sales process.”

**Queen,
Legal Counsel**





THANK YOU

CONTACT:

Suite J-05-07, Jalan Solaris,
Solaris Mont Kiara, 50480
Kuala Lumpur

+60 3 6204 9508
ask@telcowin.com

 Facebook/telcowin

 Twitter/telcowin

 Instagram/telcowin

 LinkedIn/telcowin

