

Features Comparisons 7.07

			Salesforce	
			Std	Prem
Agenda Management				
Create agendas with easy-to-follow steps	Rapidly build S.M.A.R.T. agendas from planning to execution	●	●	●
120+ fields to capture critical meeting details	Specify meeting details: layout, equipment, location, participants, tasks	●	●	●
Agenda Item definition, sequencing, & ownership	Easily set the flow, content & timing of the agenda	●	●	●
Participant Roles definition	Make meeting roles clear	●	●	●
Agenda List Sorting & Filtering	Find Agendas quickly by Account, Date, Type, Process Leaders, etc.	●	●	●
Link Agendas to teams, process, clients	View meeting agendas linked to initiatives, programs, projects, deals	●	●	●
Agenda Cloning	Share, reuse & edit preparation for similar meetings	●	●	●
Capture Meeting Minutes in context, real-time	Run your meeting from Agenda, capturing all the results in one place	●	●	●
NEW ▶ Multi-day agendas	Create, manage and run multi-day agendas	●	n/a	●
NEW ▶ Report: decisions, issues, actions for chained agendas	Report all decisions, issues and actions within an Agenda chain for completion	●	n/a	●
NEW ▶ Document explorer	View repository documents & uses in Agendas	●	n/a	●
Integration				
Synch with SF Events & Tasks	Visibility & Accountability for key events & actions	n/a	●	●
Synch with Outlook's Contacts, Tasks & Events	Keep all your desktop information up to date	●	n/a	n/a
Import / Export Contacts, Accounts & Users	Import & export your contacts, accounts & users	●	n/a	n/a
Notifications, Alerts & Reminders				
Send agenda via email to selected participants	Send professional agendas, with custom notes, to selected recipients	●	●	●
Receive Participant attendance confirmation	Stay informed on event participation	●	●	●
Agenda changes & Task assignments	Send/receive emails, agenda changes and tasks assigned	●	n/a	●
Goal & Message Alignment				
Agenda objective definition for goal alignment	Set S.M.A.R.T. goals/ align team goals for upcoming meetings & events	●	●	●
Targeted Impact Message Builder	Create winning "elevator speeches" & 30 second targeted messages	●	n/a	●
Positioning Statement	Build personal & corporate positioning statements to focus objectives.	●	n/a	●
Ask & Anticipate				
Pre-meeting Questions - Ask & Anticipate	Create, tag, sequence probing questions. Build easy reference qualification models and interview guides	●	●	●
900+ pre-populated question library for effective discovery and client interaction	Ask great questions like a pro to create the right dialogue; master strategic conversations with decision makers	●	n/a	●
Tasks				
Pre-meeting Tasks	Assign/delegate key meeting responsibilities	●	●	●
Post-meeting Actions, Decisions & Issues	Capture post meeting actions, results & lessons learned	●	●	●
Agenda, Task & Action Status Reports	Review actions by owner, team, account, event: status of tasks	●	●	●
Publish				
Publish & send meeting minutes	Keep everyone informed on the meeting results	●	●	●
Archive Agendas	Save agendas PDFs with pre- & post-meeting details	●	n/a	●
Customize				
Client Question & Anticipated Question repository	Be prepared to ask & answer questions with this dynamic FAQ builder	●	n/a	●
User-definable Agenda custom fields	Set custom fields unique to your process	●	●	●
Agenda & meeting minutes templates	Create customized formats for agendas & minutes	●	n/a	●