

Company

- Headquartered in St. Clair Shores, Michigan
- Expert in Intertel sales
- Mitel Platinum Dealer
- Member of Mitel Dealer Council

Challenge

- New to Mitel after Intertel-Mitel merger
- Homegrown Excel spreadsheet for only Intertel portfolio that was labor intensive to maintain
- Insufficient proposal materials to accommodate larger prospect requirements

Solution

- SalesDoc Architect from Cors Productivity Solutions, Inc. with subscription for Mitel configuration and Mitel-Intertel proposal content
- Integration between Tigerpaw, SalesDoc Architect and Mitel Sales Workbench

Benefits

- Accurate, consistent proposals
- Increased accuracy on solutions configurations, sales proposals and order entry
- Time-savings
- Higher-quality image

Bringing it All Together with SalesDoc Architect

"Once I saw what SalesDoc Architect could do, there was no comparison."

Since 1984 BSB Communications has been providing answers to the tough questions customers face every day. With offices in Michigan and Ohio, BSB Communications' commitment to exceed the expectations of customers, suppliers, and employees has led to long-term relationships with their business partners and continually sets them apart from their competitors. *Once an Exclusive Intertel Dealer, BSB became a Mitel Platinum Dealer after the merger of Mitel and Intertel. BSB's desire to be on the cutting edge of technology has led them to be a part of the Mitel Dealer Council*, an elite group of Mitel dealers who help forge the future direction of the Mitel product portfolio.

New Product Portfolio – New Proposals

In 2007, just after Mitel merged with Intertel, Steve Klenner, co-owner of BSB Communications, was looking for a new product configurator and proposal generator to help his team propose the new Mitel portfolio. A

Tigerpaw user for 10 years, Klenner investigated using Tigerpaw's quote module and another competitor product. Virtually everything he looked at could only do pricing and configuration but could not generate sales-ready customer proposals.

Klenner knew his team was expert with Intertel products but the Mitel solutions were a different story. The sales team was using a homegrown Excel spreadsheet that could do calculations but no descriptive proposal. The spreadsheet was initially designed for the Intertel portfolio and as a means to automatically insert often over-looked parts. Over time this became tedious to keep up. *"Every major change took me days if not weeks to work out all the little bugs because all the related formulas needed to be changed. I would spend up to 15 hours a week working on this spreadsheet," says Klenner.*

Klenner knew he didn't have the expertise to create a similar spreadsheet for the Mitel solutions. Once

Klenner saw what SalesDoc Architect could do and how it integrated with Mitel's Pricing Tool and later the Mitel Sales Workbench, he knew he had his pricing and proposal solution. "Once I saw what SalesDoc Architect could do – even over and above the Mitel Sales Workbench – there was no comparison," says Klenner.

posal. Before SalesDoc Architect, the BSB team had no easy way to generate descriptive proposals – it was always cut and paste from other documents and it easily took two to three hours to create a proposal that was likely to be inconsistent and inaccurate. Sales people inserted brochures and white papers to provide the descriptive product in-

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Today all Intertel-related products and cabling are configured using SalesDoc Architect. The team uses the Mitel Sales Workbench to configure a Mitel solution and then imports the configuration into SalesDoc Architect for everything else. According to Klenner, the key difference between the Mitel Sales Workbench and SalesDoc Architect is that proposal content is automatically inserted into the proposal based on the configured solution. A few clicks of the mouse and a proposal or statement of work is ready to print. ***Klenner brags, "Within 30 minutes we can generate a single site, 50 phone proposal. We no longer have to worry if the proposal information is correct or up-to-date because CorsPro updates it monthly and sends it to us as part of our subscription package."***

Keeping Up With the Changes

Traditionally, BSB Communications has been a Small-to-Medium Business provider. As the complexity and options grew, they were having a hard time presenting a professional-looking proposal that provided all the necessary elements that customers and prospects expected to see in a pro-

formation. If a sales person couldn't find content they needed, it just didn't go in. If they did find something, the accuracy and freshness of the information didn't matter – it was inserted in the proposal just to provide it with some bulk.

Given the lack of content, even "full" proposals were only about 10 pages long. According to Klenner, "When you get into the larger deals where the prospect expects to see a scope of work, the old way wasn't sufficient. Today our sales reps can generate a proposal as short as 10 pages or as long as 70 pages with just a click of a button. I can't tell you how many times we've had customers say that this is by far the best and most informative proposal they've seen to date among all the competitors. ***That legitimizes our capability to the customer that if we're providing this kind of documentation to customers, our support and installation process may be equal to that.***"

Deal sizes and companies are getting bigger due to the expanded product portfolio. Not only is BSB hunting down bigger deals, they're winning them.

Previously BSB's biggest deal was \$500,000. Now they're looking at deals worth \$1 million. "When dealing with a customer of that size you can't give them just a 10 page proposal. They look at it and say, 'You've got to be kidding me!' SalesDoc Architect absolutely helps prepare for those kinds of deals," states Klenner.

The Light Bulb Goes Off

Klenner admits he took a chance when he started using SalesDoc Architect. He knew he had to spend some time customizing it to his liking. His other concern was that he didn't fully understand how SalesDoc Architect worked and therefore didn't

to get to it." So he started opening up all the tabs and looking at the configuration formulas that CorsPro had written and the light bulbs went off. According to Klenner, "That was the beginning of my understanding that there was way more power under this thing than I even knew."

Klenner began recreating his old Intertel Excel spreadsheet tabs in SalesDoc Architect to include everything needed for an Intertel system. He quickly disabled his homegrown spreadsheet because he felt the sooner he got his sales team using SalesDoc Architect, the better.

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know what questions to ask. Klenner knew SalesDoc Architect had three main components: Microsoft Word for the proposals and other sales documents, Microsoft Excel for the configuration and pricing logic, and a powerful database in the background that housed all the information from proposal content to labor hours to pricing and product categories.

For BSB, the Mitel configuration logic and proposal content was already programmed into their SalesDoc Architect package – and they started using that portion immediately to configure the Mitel solutions. SalesDoc Architect also had the Intertel proposal content but no configuration logic. Klenner states, "I knew there was more power under there but I didn't understand what it was and how

Due to the complexity of his old Intertel spreadsheets, Klenner spent a great deal of time recreating the old Intertel tabs in SalesDoc Architect. According to Klenner the time was well spent: ***"The accuracy of quotes has gone up dramatically. Previously, reps were missing things that were very costly. For example, in the Intertel 5000 with a desktop faxing unit reps always forgot the licenses for hunt groups with analog devices. This mistake would cost us \$500 per license and would come off the bottom line. Today those licenses are now automatically included.*** We've put in logic to catch the costliest items that were previously forgotten along with other things that are used pretty regularly."

Eventually, Klenner figured out that he could insert his own document sections into the SalesDoc

Architect document library. "I saw the content was there, I just didn't know how to get to it. We were using SalesDoc Architect at least a couple of months before I knew we could do our own document insertion. *Brian [Cors] helped me through a lot early on. Once I figured out I could do my own doc insertion I went, 'Holy Cow!' and started putting all kinds of information in there," states Klenner.* "Our first quote had the standard CorsPro content and cover page. Once I figured out how to manipulate content I went in section by section and changed it to reflect our own business practices."

No More Night Job

Whereas Klenner once spent up to 15 hours per week keeping the old Intertel spreadsheets up to

roadblocks to getting done what he wanted to do. Although SalesDoc Architect isn't perfect, *Klenner believes it gives him much more flexibility to make changes on the fly whenever a sales person makes a suggested change.*

Klenner has changed pricing and product categories based on how BSB does business. "That was my challenge early on – I just didn't understand how all that came together and the relationship between the tabs versus importing from a configurator versus the proposal content. Once I understood how to customize it, it all made sense. Now every time we have a sales meeting and someone makes a suggestion, within a week it's in there," says Klenner.

Klenner used to spend up to 15 hours per week on his old Intertel spreadsheet. "Now a lot of what I do in SalesDoc Architect is because it's fun for me."

date, today he only spends about an hour or two a week keeping SalesDoc Architect up to date with a larger portfolio.

Klenner says, "I always referred to people here that I had two jobs – my day job and my night job. I don't have a night job anymore. Now a lot of what I do in SalesDoc Architect is because it's fun for me. It's a way for me to unwind while I'm watching TV at night. One of the things I like about SalesDoc Architect is it allows me to be as creative as I want – it's only limited by my ideas and my creativeness."

Klenner goes on to say that when he looked at other programs like QuoteWerks he found lots of

The Sky's the Limit

Klenner admits it helps to have an Excel background when it comes to managing SalesDoc Architect. He's quick to note that the team at CorsPro is always helpful when he reaches the end of his Excel knowledge. *Klenner says, "I think the beauty of Excel is that everyone on my team has it. I, for the most part, understand it. And it's limitless. Really whatever I need to do I can pull it off."*

Along with updating proposal content, Klenner has been able to break down part numbers further to reflect if a part is going on a Mitel system or an Intertel system. With a bit more Excel magic, BSB's

users can easily import these part numbers into Tigerpaw for order entry.

Tigerpaw, GreatAmerica Leasing and SalesDoc Architect

The integration between Tigerpaw and SalesDoc Architect is indispensable to the sales and opera-

with options, leasing information, and financing. This allows Klenner's sales team to see how they can improve the solution being offered. Finally, the ability to integrate with Tigerpaw and the BSB ordering system increases their ordering accuracy so that they are not ordering equipment that they already have on hand.

The integration between Tigerpaw and SalesDoc Architect is indispensable to the sales and operations teams.

tions teams. First the sales team can push the customer contact information from Tigerpaw into SalesDoc Architect. *"The team absolutely loves the ability to go into Tigerpaw then be able to push the address and contact information into SalesDoc Architect. It saves them a lot of time typing in the information only to find they've typed in the wrong phone number or something. Everybody uses that daily,"* says Klenner.

Klenner goes on to explain that *at the end of last year BSB started to manage its inventory in Tigerpaw, enabling employees to see exactly what inventory they have on hand. With SalesDoc Architect, users can export the order extract into Tigerpaw and the project manager can order the equipment with a click of a button.* Order entry has become far more accurate and efficient.

SalesDoc Architect has helped with a number of other efficiencies. Klenner believes SalesDoc Architect gives his team a better visual image of what they're proposing to a customer. From a design standpoint they can print out a schedule of equipment and put together an accurate, precise quote

"Previously we were ordering equipment without realizing we already had it in inventory. With Tigerpaw we know to take it out of surplus first then order whatever else we need from the vendor. We are no longer over-ordering. Having that accurate output from SalesDoc Architect in our inventory system in Tigerpaw allows us to know when and what to order. It is saving our inventory person an unbelievable amount of time," declares Klenner.

Klenner finds that SalesDoc Architect is positively impacting sales and purchasing due to increased accuracy. Today, accurate customer information is being stored and filed. Customers can go into their files via an online customer portal and view their assets. BSB has a far more accurate picture of what customers have on-site and can view what they ordered in the past. Klenner states, "This affects our technicians also; they use tablets to access a customer's file to see what a customer has on site and if they can meet their request. *We have so many efficiencies now. I can't imagine doing it the old way anymore.*"

BSB has also seen an upturn in their managed services and leasing offerings. "In one month we did \$250,000 with GreatAmerica Leasing. That number is going up because our guys are inherently putting that information in the proposal whereas before it was such a task to put it in. Now that it's a part of SalesDoc Architect, with a click of a button that documentation is there and we can talk to customers about it. More people are buying into managed service solutions," Klenner says.

It's All about Relationships

Klenner believes in forging stronger relationship with BSB's partners (i.e., Tigerpaw, GreatAmerica Leasing Company and CorsPro). He sees that each vendor is well aware of each other and working to tie it all together for a customer like BSB.

"Our relationships aren't just about the product but the people you're working with," states Klenner. "Brian Cors has been nothing but kind and helpful

at any time of the day or night. *That relationship of being a partner rather than only a software developer is something we recognize. I've tapped into CorsPro's insight on what's going on in the industry.* I'm always interested in seeing what they're seeing out there." Klenner also states that the relationships CorsPro has developed with Tigerpaw and GreatAmerica Leasing Company brings everything together for them.

"I'm very proud of SalesDoc Architect and the relationship we have with the CorsPro people. I'm a big proponent of it. Given the chance I'm always interested in showing it to the other dealers. Every time I show it to people who haven't seen it and do a little demo of how quickly we can get something done it gets people saying, 'Wow! I need that!'" says Klenner. *"We've been using SalesDoc Architect for nearly two years and we have proposals that I'm extremely proud of."*