



DependableTelecom

### Company

- Integrated telecommunications provider to small and mid-sized businesses in Texas.

### Challenge

- Proposals were not professional looking
- Lack of time
- Limited customization

### Solution

- SalesDoc Architect from Cors Productivity Solutions, Inc.
- Customized with Dependable Telecom's products and services
- Integration between Tigerpaw CRM+, Mitel Sales Workbench and SalesDoc Architect

### Benefits

- Professional looking proposals
- Greater efficiency
- Time-savings
- Competitive edge
- More maintenance contracts being generated

## Greater Confidence Through SalesDoc Architect

*"Having a more professional proposal demonstrates that you have more experience and that you've invested more time and money in your company. It gives the customer greater comfort that you are more stable and secure."*

Since 1991 Dependable Telecom has provided integrated telecommunications to small and mid-sized businesses in the Dallas/Fort Worth Metroplex. Dependable Telecom provides a full array of top-quality services and products including business phone equipment, data networking equipment, structured wiring, paging systems and video surveillance.

### Proposals were Lacking

Although Dependable was winning the business, Shannan Rochon, owner/president of Dependable Telecom, could see that her *proposals were not as professional as her competitors*. Referred by her Mitel account manager, *Rochon came to Cors Productivity Solutions in 2005 to learn more about SalesDoc Architect*, a customizable configurator and proposal generator. Rochon wanted a more professional proposal that stood out and gave the cus-

tomor more confidence that Dependable was "dotting their 'i's and crossing their 't's."

In the past, Rochon's proposals were typed up with equipment and prices listed on company letterhead. She would give prospective customers a binder with pre-written information about Dependable, warranty, financing and an executive summary addressing the pain points she uncovered. Each proposal had to be created anew and hand-typed.

Being a business owner of a smaller company, Rochon is not afforded the luxury of only selling. She has to come back to the office and pay the bills, purchase equipment and do payroll. *With all the interruptions Rochon faced, it could take her an entire day to work up a proposal and she felt she had to "recreate the wheel" every time.*

### Greater Confidence

In 2005 Rochon met Brian Cors, founder and president of Cors Productivity Solutions, Inc. Brian, the former Director of Marketing and Business Development at Mitel, Inc., showed Rochon a better way to propose a turnkey solution using CorsPro's SalesDoc Architect.

Using Tigerpaw CRM+, Mitel Sales Workbench and SalesDoc Architect, Rochon can generate a customized, full-turnkey solution proposal in less than 10% of the time it used to take her – even before everyone else gets into the office for the day. Using Tigerpaw CRM+, customer contact information is exported to SalesDoc Architect. SalesDoc Architect then imports Mitel equipment and services from Mitel Sales Workbench. With a few more keystrokes to select peripheral equipment, Rochon can automatically print a professional-looking proposal that

used before. Even though Dependable has been around for 18 years, this gave the impression that Dependable was a smaller company that may or may not be around in the near future. Rochon recognizes that just like her, customers and prospects are looking for a long-term relationship. *"Having a more professional proposal demonstrates that you have more experience and that you've invested more time and money in your company. It gives the customer greater comfort that you are more stable and secure than the other guy."*

### Customized for Better Solutions

With SalesDoc Architect, Rochon has worked closely with CorsPro to customize her proposals and other sales documents to reflect the way her company does business. One of SalesDoc Architect's benefits for users is its ability to be customized for each reseller. For Dependable Telecom, SalesDoc Architect

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is customized based on the customer's needs and the solution chosen. In addition to the proposal, Rochon now provides a Statement of Work that lays out expectations for both parties. Rochon believes this gives the customer a feeling of comfort now that everything is in writing.

*In today's business environment SalesDoc Architect gives Rochon an edge over her competitors.* Before, quotes were on a sheet of paper and it was apparent that Rochon had typed it using a template that was

was customized to include their specific product lines and a company overview in its proposal documents. In addition, Rochon's request for line item pricing and sum by product category (e.g., Mitel, cabling, CCTV, etc.) led to CorsPro including that function in its offering to all its clients and prospects. According to Rochon, on larger jobs customers want a price for each section. "I get a better response from prospects if I have line item pricing and it shows I am not hiding anything."

With the click of the mouse, Rochon can also include post-warranty maintenance offerings in her proposals tailored to the solution offered. This ability will aid Rochon as she moves more into the business-to-business arena. Where no maintenance was being offered in the past, today Rochon has been able to ramp up her post-warranty maintenance business by easily generating a maintenance invoice when the warranty has expired.

a business, what used to take all day – and sometimes the night – can be done in 30 minutes. Before SalesDoc Architect Rochon would have to start and stop and many times start over from scratch when working up a quote and proposal. “SalesDoc Architect helps us get our quotes out faster. It helps us meet our deadlines without burning the midnight oil. It is not that difficult to get a proposal out anymore and I feel more prepared.”

***“I can generate proposals more quickly so that I can find more opportunities that need a proposal. SalesDoc Architect gives you more confidence in the sales aspect when you’re trying to prove yourself. “***

If a customer has no contract and has a large invoice for repair, the office staff can send a letter with maintenance information inviting the customer to take out a contract. ***Using SalesDoc Architect, it is easy for the office to generate a new or renewal contract without Rochon’s help – just fill in the blanks, export customer information from Tigerpaw CRM+ to SalesDoc Architect with the maintenance amount and generate a contract*** that can be emailed, mailed or hand-delivered.

### On Top of Things

Rochon believes SalesDoc Architect has made her more efficient. With interruptions and the running of

***With one good quote a year, SalesDoc Architect easily pays for itself. It not only has helped Rochon make better use of her time, it has given her a greater competitive edge with a more professional looking proposal and maintenance offering.*** The staff at Dependable can more quickly respond to customers’ needs which is a win-win for all. “I can generate proposals more quickly so that I can find more opportunities that need a proposal. SalesDoc Architect gives me more confidence in the sales aspect when you’re trying to prove yourself. Anything that gives more confidence in a presentation is a blessing.”