



Company

- Headquartered in St. Louis, MO
- Market leader in hospitality communication solutions
- Mitel Hospitality specialist-PARTNER

Challenge

- Cumbersome pricing and proposal process
- Incomplete configurations
- Difficulty managing extensive product and service offerings

Solution

- SalesDoc Architect with ease of customization to reflect MTS' business practices
- Integration between Mitel Sales Workbench and SalesDoc Architect

Benefits

- Quick to market with accurate proposals
- Less margin erosion
- Competitive edge
- Confidence in proposals

Exceeding Customer Expectations with SalesDoc Architect

"We're providing something above par and above customers' expectations. Customers rave, 'Wow you guys have it.'"

Headquartered in St. Louis, Missouri, MTS Inc. was founded in 1990. With offices and partners nationwide, MTS continuously proves to be a market leader in hospitality communication solutions, installation and service. Building off the solid foundation of being a dominant provider of voice and data for the hospitality industry, they now offer a full range of communication solutions including voice, data, converged communications, security, call accounting and internet help desk. As one of 12 Mitel Hospitality specialistPARTNER's in North America and one of the largest hospitality network providers in the country, MTS provides its clients with the most extensive line of communication products available, from traditional PBX equipment to converged IP networks and wireless solutions.

Old School Proposals

Even though MTS offers their customers the latest in voice and data communications technologies, back

in 2005 the MTS sales team was still operating using "old school technology" when it came to generating pricing configurations and proposals. The sales team would use Microsoft Word templates, copy and paste information from Microsoft Excel sheets and three-hole punch manufacturer brochures to create a complete proposal packaged in a binder that could be mailed to any customer across the country. Mark Sanders IV, Vice President of Sales, says his team takes pride in sending out good proposals.

According to Sanders, *pricing and proposals were generated using paper and Microsoft Excel spreadsheets with manual calculations. Not only was the process cumbersome, they consistently had errors* and it took Sanders watching over everyone's shoulders to make sure everything was correct. Although Sanders reviewed every quote before sending it to operations, there might still be errors. As Sanders noted, operations have a different

mindset than sales and would catch things that the sales team may not. Big items were caught prior to a proposal being sent to a customer, but sometimes little things would get missed until the technician was on-site for the installation. ***"Every little piece you forget can add up and drastically deplete your margin – especially in markets or situations where you have to get aggressive. You don't always have that extra margin to cover the missing piece," says Sanders.***

New School Solutions

Then, in 2005 MTS' Mitel account manager suggested Sanders investigate SalesDoc Architect from Cors Productivity Solutions, Inc. Using Micro-

Today, Sanders and his team use Mitel's Sales Workbench to configure and price the phone system portion of the solution being offered. They then import the information into SalesDoc Architect to configure the rest of the solution, be it security, video, data networks or all of the above. ***Gone are the hard copy binders that must be mailed to a customer. Today, Sanders and his team simply email customers a proposal and statement of work once they've been generated by SalesDoc Architect.*** "SalesDoc Architect makes generating a proposal and statement of work very easy even though we're bundling lots of equipment into one solution proposal," says Sanders.

"SalesDoc Architect gave us limitless capabilities to make our own improvements and make the software our own for our documents, pricing and applications."

soft Excel, Microsoft Word and a database running in the background, Brian Cors, president and founder of CorsPro, had developed a solution that allows users to generate turnkey configurations, quotations, and proposals from scratch within seconds.

Once Sanders and his team understood how SalesDoc Architect worked, he says it conformed to how they've been doing business for years and simplified their lives. "SalesDoc Architect really allowed us limitless capabilities to go through, make our own improvements and make the software our own for our documents, pricing and applications. Also, ***it's flexible in how you price your solution; you can choose to mark down off of manufacturer list or mark up from cost.***"

Right on Target

When you are juggling a number of products like MTS does, it is very important to ensure you've got accurate information in front of the customer. Products consistently change – improvements, software updates, major overalls, and more. ***Using SalesDoc Architect, Sanders now has the means to send pricing updates and other information to the sales team within a day of receiving any updates manufacturers send. Sanders makes global updates and sends them to everyone with a simple mouse click.*** He can quickly fix errors and send the corrections to users so that the same error is not made again. Sanders likes that as soon as he sends out updates to pricing or proposal information everyone has it in their hands. With accurate

proposals, MTS can go to market more quickly than they used to be able and much more quickly than their competition can.

Easily updating product configuration, pricing and proposal information makes the proposals more targeted to customers' needs. Because Sanders

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has customized SalesDoc Architect to reflect his company's business by creating spreadsheets and adding product information to SalesDoc Architect's open database, proposals better reflect the customers' needs with accurate equipment, labor and pricing. *Sanders comments, "We are more confident in our proposals than our competition. We trust in SalesDoc Architect - we trust that the calculations work and that the configurations work. We believe SalesDoc Architect is going to provide more accurate information. The more accurate we can be for the customer and their needs, the better.* From operations' perspective things flow through easier when sales are correct. Operations are happy because they have all the tools they need to make their jobs and their lives easier."

Sanders likes being right all the time. He doesn't mind if the competition gets a copy of MTS' proposal because he knows it is correct. *When he sees a competitor's quote and compares it "apples to apples," Sanders catches "inconsistencies, errors and problems with the configuration that simply aren't right."*

Taking it Further

When working with a customer, the MTS sales team doesn't just take an order and move on, they listen to their customer and gather the customer's needs. MTS provides guidance and options to their customers so that the correct solution is provided. Sanders and his team use the "Options" capability

within SalesDoc Architect to provide the customer with a more customized solution rather than a cookie-cutter product that may or may not be what the customer really wants. *Using options, MTS can provide customers with choices to hone in on their exact needs and wants. "Customers believe we are extremely professional by utilizing SalesDoc Architect. It puts out professional information every time and it conforms to our mentality that we want to be better. We want to always do what's right for our customer," says Sanders.*

Proposal and configuration information is customized and automatically generated based on the equipment chosen for a solution. As the administrator of SalesDoc Architect, Sanders has been able to easily work with Microsoft Excel to create approximately 20 configuration worksheets within SalesDoc Architect for all the products they sell. In addition to the Excel worksheets, Sanders has also added proposal information to the database library that produces the proposal in Microsoft Word. He recently added the MTS sales contract to the database library with logic that the sales contract is included every time a new proposal is generated. Now every time a customer receives a proposal,

(s)he also receives a contract that can be signed in real time if (s)he so chooses.

According to Sanders, “We consistently get comments from our customers – ‘Wow you guys put together a very professional proposal.’ We hear that all the time. Our competition doesn’t do that. We’re providing something above par and above customers’ expectations.”

Fast and Accurate

“Prior to SalesDoc Architect, it used to take us approximately two to four hours to put a proposal together. *Today, using SalesDoc Architect we can put something together in as little as a minute to put in front of the customer. Within 30 minutes we can present a rock-solid proposal to the customer,” Sanders tells us.*

Fast proposal generation is great, but is it accurate? Yes. Because Sanders has customized SalesDoc

Architect with MTS’ complete product portfolio and certain configuration logic, the little things no longer get missed. The sales team is confident that their proposals have it all. This is reflected all the way down the line – to operations who know nothing has been missed and to management who have seen the bottom line improve because nothing has been forgotten that can eat into margins.

According to Sanders, customers are taking notice. They’ve responded to how quickly they’ve received a proposal and about its completeness. Sanders says, “Customers are shocked by it and taken back that we put a proposal together so quickly. In some scenarios we’ll kick out a 40 page proposal of different things just because of the various products we work with. They’ll say, ‘I got your 40 page proposal.’ *They’re getting all the information they want which is fantastic.* They’ve definitely responded back with, ‘Wow you guys have it.’”