

Company

- Headquartered in Littleton, CO
- Expert in integrated communications solutions, including voice, data, cabling, VoIP and IT managed services
- Avaya reseller

Challenge

- Spending too much time on proposals, especially for high volume, small revenue Avaya IP Office sales
- Finding a more robust proposal tool to expand into new product lines and new customer markets
- Leveraging integration with existing Tigerpaw CRM application

Solution

- SalesDoc Architect from Cors Productivity Solutions, Inc. with subscription for Avaya proposal and automation content
- Integration between Tigerpaw, SalesDoc Architect and Avaya/ distributor configuration tools

Benefits

- Time savings with high-volume Avaya IP Office sales
- New hire training
- Improved customer interface
- Enhancement of Tigerpaw CRM
- 40% revenue growth and sustainable profitability

Raising their Game with SalesDoc Architect

"We can propose easily and efficiently AND we have a more professional proposal going out the door - with a better chance to close the deal."

If you ask Brian Thomas, Chief Operating Officer at VoIPMyBiz.com, how business is doing, he'll tell you that sales are going extremely well. Founded in 1996, VoIPMyBiz.com provides a host of integrated business communications solutions to clients, including IP telephony, cabling, video conferencing, data networking and IT managed services. The company boasts a solid lead generation process, successfully introduced a new product line — Avaya IP Office — in the last year and now has plans to penetrate some underserved customer markets. Thomas believes these accomplishments have been achieved and future objectives are attainable in large part because his company has been able to save time, increase quote accuracy and produce highly effective, professional proposals, statements of work and other sales documents since implementing the use of SalesDoc Architect.

Finding the Right Sales Tool

Thomas and VoIPMyBiz.com President and CEO, Jeff Myers,

wanted to raise their sales game and highlight their solution and service capabilities by implementing the use of a professional sales proposal and quoting tool. Thomas conducted a search for document generation tools and found that many of the applications available were either intended for larger companies that could devote a lot of time, money and resources to development and programming, or they were tools that were generally light on features and functionality. Thomas eventually found SalesDoc Architect through Tigerpaw Software, creators of the CRM software that VoIPMyBiz.com uses for contact management, order processing and other back-office tasks. Tigerpaw and CorsPro teamed up beginning in 2009 to create seamless integration between Tigerpaw CRM and CorsPro's SalesDoc Architect proposal automation software, providing their joint customers with an integrated 'total solution' from pre-sale proposal generation through to service delivery.

Thomas was pleased to find that

SalesDoc Architect was different from all of the other document generation tools that he evaluated. He considered CorsPro's tool to have a good price point, great functionality and features and, since the software is easily customizable and programmable, Thomas knew he could expect a faster implementation and low ongoing

disposal. We had to take a step back and determine how to leverage the new features as they related to our existing processes," said Thomas. For instance, VolPMyBiz.com sales process workflow begins with lead capture, requiring sales reps to enter prospect data into the Tigerpaw system as a first step. "SalesDoc

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development costs for his company. The icing on the cake for him, though, was that SalesDoc Architect integrates with Tigerpaw and other applications such as manufacturer and distributor configuration tools that are strategic to VolPMyBiz.com sales and order processes, such as the Avaya ASD, EC and EZQuote tools and the Catalyst configuration tool. Thomas concluded that these integration and import features would give them a truly flexible, integrated proposal generation solution and enable them to fully leverage their existing front and back-office applications. After a hands-on solution evaluation utilizing CorsPro's no-risk 30-day trial, VolPMyBiz.com purchased SalesDoc Architect in early 2011.

No More Huge Administrative Burden

Thomas found that the implementation of SalesDoc Architect went very smoothly: his sales team was able to get up to speed and produce proposals and other sales documents right away. "Once we implemented, we quickly realized that there was a great deal of functionality at our

Architect encourages our sales reps to enter their leads into Tigerpaw because once they do that first step, they can simply pull the information into SalesDoc Architect to begin a quote or full-blown proposal with no re-keying required." Similarly, integration with manufacturer and distributor configuration tools for voice, data and cabling solutions gives users the ability to import a solution configuration in seconds. As a result, proposal accuracy has gone up and pricing errors and omissions have gone down, saving the company on these costly mistakes.

Automated document generation has improved all aspects of the sales process for VolPMyBiz.com. The company moves a prospective sale through stages with documents required at every sales stage, from initial talks to proposal, purchase agreement, statement of work and final closure documents. "Before SalesDoc Architect, it would take a salesperson about a day to complete the entire job package for a sale. Now, it takes about five minutes – the huge administrative burden is gone."

Thomas also points out that by reducing the time spent on proposing smaller systems, such as Avaya's IP Office solution, his company has saved dramatically on the cost of sale. "IP office is a small sale, so there's not a lot of benefit to spending too much time on generating a proposal. Now that we have SalesDoc Architect, we don't have to devote hours to the process. We can propose easily and efficiently *and* we have a more professional proposal going out the door - with a better chance to close the deal."

Each VoIPMyBiz.com salesperson generates between five and 10 proposals per month for the various solutions that the company offers. Feedback from the sales team has helped Thomas add more customized features to SalesDoc

Consistency and a Streamlined Workflow

Before VoIPMyBiz.com implemented SalesDoc Architect, proposal content was inconsistent and the approval process for a solution sale was cumbersome. Now the company uses CorsPro-managed content for Avaya solutions, and the tool has become a repository for up-to-date content and templates to consistently propose all of their voice, cabling, video and IT managed services solutions. "We are able to provide customers with a consistent, professional solution proposal because we have all of the information in one place, in one tool for our salespeople to use." VoIPMyBiz.com also uses a sign-off checklist generated as part of the proposal package so that the salesperson can obtain the appropriate approvals along the path to closing the sale.

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Architect, such as a help note for any items selected that include additional labor hours added to the quote. "SalesDoc Architect automatically calculates and adds the labor to the quote, which is great, and the help note enables the salesperson to see what's going on and how the prospective buyer's solution is configured and priced," says Thomas. "Some of the new hires don't realize how much better this process is than before. New salespeople are up and running so much faster and spend much less time on sales administration. Plus we have a hands-on training approach now because the pre-sales engineer can help them create a few practice quotes in the tool to get them comfortable proposing."

SalesDoc Architect has enabled VoIPMyBiz.com to streamline their entire sales workflow by using the tight integration with Tigerpaw CRM to create one cohesive process for proposals, ordering and commissioning of the solution sale/services, without having to manually re-key data at any point in the process.

A Better Customer Experience = Better Results for VoIPMyBiz.com

Since implementing SalesDoc Architect, VoIPMyBiz.com has noticed that prospective buyers like what they're getting: a faster response and a consistent sales experience. "We get a lot of feedback from customers – they are happy with the

professionalism of the sales process and have a better feel for what they are buying because of the detail that we provide in our sales documents. There is consistency throughout the process, and it shows our buyers that we are a reliable business partner." For VoIPMyBiz.com, consistent data also

noticed. VoIPMyBiz.com has drawn the attention of existing and potential new business partners as a result of their successful growth in the last year. "Avaya has come to view us as a top VAR in their channel program. They are interested in what's driving our success, because many in the industry

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means that they can reduce or eliminate the sales mistakes and omissions that lead to margin erosion, which increases the overall profitability of the business.

VoIPMyBiz.com has seen a healthy increase in their top line revenues as well, which Thomas attributes to SalesDoc Architect combined with their 'VoIPMyBiz' marketing program. Thomas estimates that this year the company achieved approximately 40% revenue growth, and he is confident that a 30% growth rate is sustainable going forward. "Without SalesDoc Architect in place, I don't think we would have been able to expand our business like we have done this year – our revenue growth probably would have been cut in half."

Well Positioned—Ready for New Opportunities

If you are doing your job well, you're bound to get

are struggling," says Thomas. Similarly, technology consortiums like Sonic MG are recruiting data players with a strong management team and repeatable business processes. "To be Sonic-certified is a tough process. It speaks to how a company runs their business. SalesDoc Architect has certainly helped us show Sonic that we have a sustainable, consistent, repeatable business process."

Thomas says he will continue to rely on SalesDoc Architect to help VoIPMyBiz.com sell more solutions. "There's a lot of functionality in SalesDoc Architect that we haven't tapped into yet, like the optioning feature, which will give our clients even more choice on what type of solution we provide them. And CorsPro continues to add new features and content to support complex solution sales and build our mutual trust. Because of that, we definitely feel well-positioned to take on new opportunities and continue our sales success."