

Company

- Located in Parsippany, NJ
- 20 years of growth
- 30 North American offices
- Platinum-certified Avaya Connect partner

Challenges

- Slow responsiveness to requests for IP Office proposals
- Manual and time-consuming proposal generation process
- Inaccurate and inconsistent scopes of work
- No systems integration
- Poor ability to generate multi-site quotes

Solution

- **SalesDoc Architect** from Cors Productivity Solutions, Inc. with subscription for Avaya proposal content
- Integration between Navision back office software, SalesDoc Architect and Catalyst configurator
- Inclusion of various outputs (e.g., maintenance and purchase agreements)

Benefits

- Accurate, consistent proposals and scopes of work
- Faster response to proposal requests
- Super quick multi-site generation capabilities
- Record-breaking sales growth!!

Strategic Products and Services

Growing with SalesDoc Architect

"It goes a long way in impressing the people you want to impress."

Based in Parsippany, New Jersey, Strategic Products and Services (SPS) is a global, multi-vendor systems integrator of business communication solutions, with over 20 years of profitable growth and offices in more than 30 North American cities. As a Platinum-certified Avaya Connect channel partner, SPS holds over 350 Avaya certifications and has expertise in contact centers, messaging and unified communications. SPS has grown aggressively since its founding in 1988 by winning new customers, acquisitions and partnerships. With its many partnerships, SPS is able to provide their customers with an end-to-end portfolio of products, applications and services. 2014 has not been an exception as they continue to experience excellent growth.

Keeping up with growth

Continued growth can be a double-edged sword. Revenue growth provides opportunities to increase profitability, but often companies can't keep up with that growth. For example, how do you manage the

sheer number of proposals and scopes of works that are going out the door? How do you make sure you're able to turn around a proposal in a timely fashion that is also accurate and customer-specific? These were some of the issues Jody GrandPre, Mid-markets Vice President, recognized when he came on board at SPS approximately two years ago.

In the past, it could take an Account Executive up to two weeks to pull together a proposal and scope of work following the initial customer meeting. GrandPre's group of 40 or so sales people focus on selling Avaya's IP Office solution to small and mid-size companies who demand quick responsiveness. As GrandPre points out, "In the market we serve, speed is pretty important." *The proposal process was too manual and time-consuming for that market, with too many hands touching the proposal before it was finished.* Various parts of the proposal had to be approved by the implementation team to ensure

that what was being presented was correct. This process was especially difficult for multi-site solutions. *Not only was this labor-intensive and time-consuming, but – because the entire solution configuration, pricing and proposal generation process wasn't automated – it also led to inaccuracies.*

Prior to implementing CorsPro's SalesDoc Architect (SDA) software, SPS account executives used a large, complex, home-grown Microsoft Excel spreadsheet to configure the Avaya solution and calculate pricing. That spreadsheet automated the pricing, but it didn't automate the creation of proposal and scope of work content that described the specific solution and its benefits to the customer. The surrounding descriptive proposal – if it was even done at

from every Account Executive and most of the time they were not correct. They didn't match what was sold."

With most of their proposals involving multi-site solutions, it was clearly necessary to improve the proposal process to make it more efficient, effective and accurate. The slower and more 'piece meal' process threatened to hamper SPS's growth by taking too long for proposals to reach customers, potentially resulting in lost sales for SPS.

"We are self-sufficient machines!"

At the time that GrandPre and Vel Johnson, Executive Vice President of Sales, were looking into how to improve their situation, they met Brian Cors, presi-

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all – required lots of cutting and pasting and going back and forth between SPS template documents and the Avaya configuration tool. Plus, the proposals didn't include maintenance and support, which required going to yet another person for a quote, thus adding more time to the sales cycle. According to Maureen Merola, Sales Director for SME East, "Proposals were a generic SPS proposal that were more geared toward the Communication Manager space [rather than the IP Office space]. We'd use the Avaya proposal template and cut and paste in the SPS overview. There was a lot of cobbling together of items. As for the scope of work, you'd just write your own. It was really not making project management happy." GrandPre concurred, saying the biggest problem with the scope of work was that *"there was no consistency. They looked different*

dent and founder of Cors Productivity Solutions, Inc., at the International Avaya Users Group conference. *GrandPre and Johnson recognized that by using SalesDoc Architect (SDA), they could surpass their goals because of the speed with which proposals, scopes of work and contracts could be generated.*

Jim Herde, Senior Account Manager at SPS, spends a lot of time producing proposals. Since SalesDoc Architect is capable of producing various kinds of documents required by the sales process – such as company overviews, purchase and maintenance agreements, service information and scopes of work – and those documents can be generated simultaneously or separately, it affords him with the opportunity to generate the sales documents that he needs with just a few mouse clicks. Said Herde,

"Where we are now with our capabilities, we are self-efficient machines. The ability to pull everything together without going to our engineer or the back office, to move quickly in the marketplace and get it to the customer, and then if it is wrong, revise it within an hour and get it back out there, is a tremendous service. The end result should drive more sales and quicker sales in the marketplace."

Since implementing SalesDoc Architect, SPS has been able to dramatically increase the volume of proposals generated. Account executives are not dependent on others to do their solution configura-

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tions; they can configure their own solution designs and quickly generate their own proposals, scopes of work, maintenance contracts and other sales documents. And, because SDA works within the familiar Microsoft Word and Excel software tools, the learning curve for new users is short. Account Executive Kris Pocaro, who uses SDA on a regular basis, likes how SDA enables her to be independent: "I don't have to be dependent upon someone else to do my configuration, import it into the tool, and spit something out. I can work whenever I want. I can visit a customer in the morning, come back to the office and have a proposal to them by 5pm. That did NOT exist before this tool. Or I can see customers during the day and do proposals later in the evening. I can work offline and not be on the VPN. I can work anywhere – the train, at home." Herde agrees: *"It allows anytime access anywhere. SDA's ease of use has made my life extremely productive and has ac-*

tually freed up time to get a little better quality of life. We have control now. When an individual has control, they can set their own pace, set their own time, they can get things done."

For SPS, this allows for more proposals to be produced, increasing the potential for more sales. Organization is essential to this increased volume and the fact that SDA can aggregate multiple requirements – solution configuration, pricing and sales document generation – into one software tool is extremely helpful. As new products and services have been introduced by Avaya and SPS, SDA has proven

to be very flexible, adaptable and easily changed to incorporate the new offerings. As a result of SPS' offerings and resources – and with the help of SalesDoc Architect – Grandpre's group has been having a banner year in 2014, with revenues exceeding plan. *"Our volume has increased and we are not taxing resources for that increased volume," states GrandPre. "Despite our increased volume, we have not had to add any pre-sales resources."*

Scopes of Work Match What is Sold

One of the biggest benefits that SDA has provided to SPS is the ability to produce better scopes of work (SOWs). SDA enables account executives to generate consistent SOWs that precisely match what's being sold and, because they're generated in Microsoft Word, they can be further modified to describe complicated and unusual implementations. *The scopes of work now list out exactly what will be*

installed so that everyone is on the same page, saving time and money and eliminating misunderstandings. Said GrandPre, "Customers are not looking at a scope of work of something they are not buying or we are not implementing. To me that has been the biggest thing - the scopes of work match the configuration of what we are installing."

Herde felt that an inaccurate or non-existent SOW causes at least two issues. First, if you have a SOW that does not match what's being sold, the customer

specific content to SPS' SDA setup, but also to suggest and implement new functionality that makes SalesDoc Architect even easier and more effective to use. When users request new functionality, or – as recently happened – SPS marketing requests updates to the proposal template, CorsPro is quick to respond. According to Glenn Johnson, Solutions Architect for SPS, "The responsiveness has been great, support has been fantastic. We have never gotten a response from CorsPro that what we need to do,

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might require you to do something that was not planned for originally. Second, misunderstandings can occur between project manager, account executives and customers, resulting in lots of wasted time. Per Herde, "An accurate SOW resolves those issues, and sets the stage for a smooth transition from the sales team to the implementation team."

Flexibility and Partnership

As part of its SDA setup, SPS utilizes CorsPro-maintained sales-ready proposal content for the Avaya product line. So, in addition to providing the SalesDoc Architect software, CorsPro also provides industry-specific content as well as expertise and an understanding of how SPS operates as a technology solutions provider within their industry. That understanding allows CorsPro to not only add industry-

could not be done." As an industry expert who understands how SPS operates, CorsPro works in partnership with SPS to provide the software and content – such as proposal content, solution configuration rules, and SPS-specific software features – that are tailored precisely for SPS.

SDA-generated proposals differentiate SPS from their competition. Proposals are now produced quickly, accurately and professionally. Pocaro summed it up by saying, "The end result is a professional-looking document that stands up and behind all of the other documentation we have (brochures, website, etc.). *It goes a long way in impressing the people that you want to impress.*"