

Company

- 40+ years providing integrated telecommunications with a strong focus on IP and unified technologies
- Nortel Networks reseller
- 350 employees throughout the east coast

Challenge

- Proposals were inconsistent
- Outdated pricing and terms and conditions
- No standardized tool for sales or maintenance pricing and proposal generation

Solution

- SalesDoc Architect from Cors Productivity Solutions, Inc. with subscription for Nortel proposal content
- Customized to reflect Ronco's business practices
- Integration between Nortel Enterprise Configurator, SalesDoc Architect and LINUX back office system

Benefits

- Accurate, consistent proposals
- Less margin erosion
- Time-savings
- Competitive edge

Accurate and Consistent Sales Documents with SalesDoc Architect

"If I took SalesDoc Architect away from the sales team I'd have a revolt on my hands! The sales engineers love it."

Founded in 1965, Ronco Communications and Electronics, Inc. is an integrator of innovative products and services, with a strong focus on IP communications and unified technologies featuring Nortel Networks' communications solutions. Ronco has nearly 20 offices up and down the Eastern Seaboard with over 350 people in sales, engineering, technical support, service and installation.

Inconsistencies and Outdated Information

As Ronco grew and acquired its sister company, it took on the various tools used by its ever-growing sales team located in various offices. This led to inconsistencies in sales proposals being generated and given to clients. *Since there was no standardized tool, clients who crossed territory boundaries received proposals for similar projects looking completely different from one another.* Many times the professionalism of proposals was also in ques-

tion. Depending on the amount of work a salesperson put in to creating a proposal, a client could receive a more elaborate proposal with a schedule of equipment, pricing and brochures in a tabbed binder or a proposal that was one page long with a one-line description of the job and an extended price.

According to Mike Bucklaew, Sales Engineering Manager, the company had more than just inconsistencies with proposals. *Being a company that has been around for more than 40 years, the sales team had no real handle on version control over templates that were floating around. Some templates had "been used forever – even if the thing had been obsolete for 30 years."* Salespeople kept a copy of the proposal template on their computers and made individual modifications to it over the years. Unfortunately some things wouldn't get updated, including pricing and terms and conditions. The maintenance contracts were the biggest

culprits. Bucklaew says, "People would do a maintenance contract with pricing from 1985 and outdated terms and conditions. The language no longer applied to what was being done."

Maintenance First

In 2007, Mike Bucklaew and John DiNatale, Executive Vice President of Operations, were introduced to Brian Cors, president and founder of Cors Productivity Solutions, Inc. Using Microsoft Excel, Microsoft Word and a database running in the background, Cors had developed a solution that allows users to generate turnkey configurations, quota-

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tions, and proposals from scratch within seconds. His solution was named SalesDoc Architect. *"Once we saw SalesDoc Architect, what it could do and how easy it was to use, we just loved it,"* said Bucklaew.

Bucklaew started slowly. From a standardization point, maintenance contracts were the worst across the organization. Bucklaew saw the opportunity to correct the matter and seized upon it. Because SalesDoc Architect was so easy to customize to reflect their company's way of doing business, *Bucklaew quickly dropped in Ronco's terms and conditions and entitlement language into SalesDoc Architect and distributed the updates to his team of 12 sales engineers.* Almost immediately, Bucklaew and his team were generating contracts quickly and efficiently with up-to-date pricing and language.

Today, sales personnel go to their sales engineers for a uniform proposal that is the same from any office. Per Bucklaew, "Sales love it; it's less work for them and they like the way the output looks."

Not Just For Maintenance Anymore

Once Bucklaew and DiNatale saw what SalesDoc Architect could do for maintenance proposals, *they started to take advantage of the Nortel proposal information offered with their SalesDoc Architect subscription* and used the tool for new system sales.

Prior to using SalesDoc Architect, a sales person would use a boilerplate proposal, get pricing and assemble brochures to put in a binder. Many times once the sale person looked at the brochures, (s)he would realize the information was outdated and would have to look on the web for new ones. Once on the web, the sales person may not have been able to find the information (s)he was looking for because the website had been changed. It would be the night before a bid was due and the sales person wouldn't be able to find the information (s)he wanted. If it took a sales person too long to put together a decent proposal, it just didn't get done.

Today, with SalesDoc Architect and the subscription to Nortel proposal content, the information is always up-to-date. As part of its subscription, CorsPro works with its clients to ensure that the

information they receive is the most accurate available. CorsPro personnel check with clients about new releases and then pull down information from the vendor website to include in the proposal sections that are automatically generated from SalesDoc Architect.

part numbers then trigger the required proposal and Statement of Work sections that are automatically outputted in Microsoft Word. Finally, using a custom programming file created by CorsPro, a CSV file is created that can be imported in to Ronco's LINUX system to generate pricing, a bill of

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Bucklaew has this to say: ***"Today with SalesDoc Architect and the Nortel subscription we are confident that the information is up-to-date. That's the time savings: sales don't have to look for brochures only to find out they are out-of-date. Proposal documents are being generated by SalesDoc Architect with current information. That's a great feature."***

For large system sales, salespeople go to the sales engineering group with their customers' requirements. For Nortel solutions, the engineers start in the Nortel Enterprise Configurator (NEC) and work up the Nortel configuration. Using SalesDoc Architect's import function, the information is imported from the NEC into SalesDoc Architect. Peripheral products and services are then auto-configured based on the configuration logic Bucklaew has programmed into Sales Doc Architect. Since the configurator portion of SalesDoc Architect uses Microsoft Excel and a basic database, Bucklaew easily imported Nortel part numbers and proposal sections associated with each part number into SalesDoc Architect. In addition to Nortel part numbers, Bucklaew also imported labor part numbers and calculations to complete the configuration. The

material and allocate manpower for the job. ***"Now we have something nice in just a couple of minutes. We went from having nothing to have a full-blown proposal that is accurate,"*** says Bucklaew.

Happy Customers, Happy Management

An accurate, well documented proposal with a statement of work not only makes the customer happy, it makes management happy. Because Bucklaew is easily able to customize SalesDoc Architect to the way Ronco does business, the little things are no longer missed. ***Bucklaew has added logic to make sure everything is configured properly.*** In the past, sales personnel had to manually add peripheral parts after importing the Nortel output from the NEC into LINUX. Using SalesDoc Architect those extra parts are automatically brought in and the little things are not forgotten. ***"SalesDoc Architect has helped to eliminate margin erosion. The little nitpicky things that would get left out because they were thought to be inconsequential, like a patch cord, are in there.*** Although the forgotten part may have been a small ticket item, you already have the technicians on site

and they don't have everything they need for the install. There's back office labor to order the correct parts and getting people re-dispatched. There's where the costs add up. Now the little things never get missed. We absolutely see an improvement in margins."

Ronco also now provides its customers with a statement of work. This helps the customer to really understand what they are buying, at what price, and sets the expectations. Where there was once weak documentation and low expectations, there is now complete proposals and statements of work that help forge relationships. According to Bucklaew, "A good statement of work reduces customer tension. SalesDoc Architect helps eliminate misunderstandings."

come together in a clean Word document. "I really like having the ability to make background calculations and being able to go to range names and create checks and balances. I haven't been stymied with anything I've wanted to do which is surprising. *With any tool you get, it seems to work 85% of the time and with the other 15% you have to grab something else. I haven't found that to be the case with SalesDoc Architect," comments Bucklaew.* "Our company is trying to change all the time; with SalesDoc Architect I can jump right in and get something that works."

For Bucklaew and his team, SalesDoc Architect is flexible enough that when changes are requested, the team is confident that Bucklaew will have the changes in SalesDoc Architect quickly.

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Ease of Use

Ronco has a mixed environment of Microsoft Office 2003 and 2007. Because SalesDoc Architect is built on a Microsoft platform, it can work in any Office environment going back to Office 2000. More so, since most SalesDoc Architect administrators have an Excel background it is easy to create calculations and logic for quantities and pricing. *Bucklaew feels there is a nice balance between Microsoft Excel, Microsoft Word and SalesDoc Architect's background database. He likes that he can do calculations in Excel, put data (be it part numbers, labor information, or proposal information) into the database and have it all*

That Was Then, This Is Now

Sales managers and sales people like what they are seeing. Sales people say SalesDoc Architect makes their lives easier. Before, sales engineers used to put together a Schedule A pricing sheet for sales people, tell them to attach the pricing sheet to their PDFs or brochures and be done. Now, sales personnel receive a full proposal they can modify using Microsoft Word. SalesDoc Architect has taken them that much farther.

Something that today takes five minutes to create could take 8 hours in the old days. With the old way of doing things, a proposal would look like

a “hodge-podge” of information. For example, proposals would include PDFs of the Ronco company overview, quoted phone system, and phone sets. Unfortunately, because they were created at different times, everything looked different.

“Under the old method a lot of different elements would get thrown together in a binder separated by tabs and there’d be no uniform look or feel or language to any of it; and that would take hours to put together. Now in a couple of minutes I can generate a table of contents and one complete document that has all the proposal information and the pricing

with a statement of work that all looks the same, feels the same and is one unified package rather than a bunch of parts thrown together,” states Bucklaew.

One of Bucklaew’s favorite things about SalesDoc Architect is that he can put it in the sales engineers’ hands and get feedback as to what they want. “If I took this away from them I’d have revolt on my hands! The sales engineers love it; it makes their lives easier and makes them more productive. The team loves it and wouldn’t want to go back to not having it.”