



Top 20 Challenges Solved using SalesDoc Architect

We know you face challenges throughout your sales process. SalesDoc Architect (SDA) helps you qualify and deliver complex configurations, proposals and statements of work. Check out the common challenges many face and how SDA overcomes them.

1. We don't gather all the right information up front, which impacts solution design and proposal development downstream.

When sales people do not accurately communicate customer needs and requirements, engineering fails to have a complete picture to design a complete solution. With SalesDoc Architect, rules and workflows are used to ensure that all needs and requirements are uncovered through a set of pre-defined criteria. The information collected is then fed to engineering and flows into the quote file. You can be confident that the design, configuration and resulting proposal reflects what was initially discovered early in the sales process.

2. We waste time on bad sales opportunities because we didn't properly qualify the prospect.

Chasing every opportunity wastes resources. Having a list of questions to evaluate opportunities helps direct energies to the best outcome. Using SalesDoc Architect, you can include your company's qualification questions in advance so that your team spends its energies pursuing potential opportunities that eventually lead to sales.

3. We underestimate the labor needed and forget to include required products and solutions.

When the right questions aren't asked up front, items such as a required network assessment or supporting equipment and services can be left off a quote. Without this information, engineering cannot do their job to ensure the job is properly sourced with the right amount of labor hours and ancillary supporting equipment and services. SalesDoc Architect builds in detailed discovery into every quote with logic that guides users and ensures all the right questions are asked. The answers to the questions automatically flow throughout the quote file to ensure the quote is configured properly.

Are you ready to sell more in less time?

www.CorsPro.com contact@corspro.com



4. Configuration changes require us to start the process all over again.

Changes occur throughout the sales process and when there is no way to easily adjust a quote you often have to start from scratch. SalesDoc Architect provides version control and automated configuration tools that prevent you from leaving off important items. The SDA quote file becomes your receptacle of items related to the proposed solution. One place to house all your information so that when changes occur they easily flow to the rest of the configuration and generated outputs.

5. We have multiple versions of sales Excel spreadsheets that are not up to date.

Often companies use home-grown tools based on Microsoft Excel. Many times, there is a proliferation of these Excel workbooks so keeping them up-to-date and ensuring everyone has the latest version becomes a nightmare. In addition, they don't always "talk" to other tools such as CRM or manufacturer/distributor tools. SalesDoc Architect is designed with advanced Excel formulas that allow you to import from 3rd party tools, pull/push information from CRM, and easily update parts, pricing, proposal and statement of work with a click of a button.

6. Proposals and Statements of Work take too long to deliver, especially with revisions.

When you are manually creating a proposal or statement of work, having to re-invent the wheel every time, you lose valuable time. Add numerous revisions on top of that and the time to deliver the proposal/SOW increases time to delivery. SalesDoc Architect's document automation enables you to generate a fully customized proposal based on customer requirements quickly. Customers tell us that what used to take weeks, only takes hours to accomplish.

7. Statements of work don't clearly define the scope of a project.

A poorly-defined project scope can lead to costly misunderstandings. If expectations are not set properly, your team may believe they are delivering only one or two parts, while the customer may think they are getting "everything" SalesDoc Architect's detailed discovery module using rules and workflows ensures all pre-defined delivery boxes are checked in advance, ensuring a smoother transition from your team to the customer. Answers to pre-defined criteria flow into the statement of work, helping complete an accurate project scope.

8. Proposals don't address customer-specific issues.

Often proposals are a dump of every PDF brochure available. When proposing products like headsets, every possible model may be included. This creates a very long proposal that risks causing confusion. Customers only want to read what's pertinent to them. With SalesDoc Architect, you can create customized proposals based on the specifics of what is being sold. SalesDoc Architect auto generates proposals and statements of work based on the configured equipment and services part numbers.

Are you ready to sell more in less time?

www.CorsPro.com contact@corspro.com



9. Documents are full of errors.

When you use the old cut-and-paste methodology of creating a proposal or statement of work, you risk including incorrect information such as the wrong customer name. Manually creating a configuration quote, proposal or statement of work opens the door to mistakes. SalesDoc Architect automates document creation based on parts and services quoted eliminating the risk of incorrect information being included in the final output.

10. Configuration changes require us to manually adjust our proposals and statements of work, which takes time and leads to errors.

Without an automated system, configuration changes must be manually updated in both a configuration quote file and to all associated documentation. Items that should be included can be overlooked while extra items that are no longer required may be included at extra cost to the customer. With SalesDoc Architect configuration information is housed within the SalesDoc Architect quote. File changes automatically flow to the proposal and statement of work eliminating manual adjustments and the errors that can result.

11. It's hard to collaborate with others regarding quote and scope changes.

Sales people will often work independently on sales opportunities. Once they've qualified a prospect and outlined the requirements, they hand that information to their engineering and operations team. Using SalesDoc Architect's auto-naming and auto-saving functionality, sales can save quotes to a central location and easily transition the initial quote to engineering for configuration and approval. The SDA quote becomes the receptacle to house customer requirements and changes so that everyone has the latest and greatest version to collaborate, turning out accurate proposals, faster.

12. We can't track our quoting activity.

An inability to track quoting and sales activity leads to a loss of control over the sales process. Without having the insight into see how activity is progressing, you don't know the what next steps to take. And, you can't rely on CRM notes always being updated. SalesDoc Architect's cloud-based dashboard provides sales and management a clear view of all sales activities including opportunity and quote management. And because the SDA Dashboard is tied to the quote files, changes made in the quote file are pushed up to the dashboard practically in real-time.

13. We manually enter project details (including configured products and services) into our other systems.

Many sales organizations use manufacturer configuration tools to engineer the proposed solution. But when it comes to entering this information into order entry or inventory systems, it



must be done manually. This not only takes valuable time, it leads to errors of mistyped part numbers or quantities or may lead to items being overlooked and not ordered in the first place. SalesDoc Architect is not only integrated with various manufacturer and distributor tools, but also to back-office systems. Discover how to load project details from SDA into other systems automatically.

14. We re-enter same information from prior steps to generate the job package.

Many times, the same information must be repeatedly entered into various systems. Think of the number of times you have had to enter a customer's contact information or customer number into various systems. Manual re-entry takes valuable time and can lead to mistyped contact information, part numbers or quantities that – as a result - fail to get ordered. SalesDoc Architect's integration with back-office systems provide the means to push job cost package information out of SDA into order entry systems ensuring what was quoted, gets ordered.

15. Customers aren't clear about who is responsible for what.

Not clearly setting expectations and clearly outlining responsibilities can lead to costly misunderstandings when it comes to implementation and cut-over. SalesDoc Architect's detailed discovery module uses rules and workflow to ensure these questions are answered, setting the stage for a smooth transition from your team to the customer. Answers to these questions flow into the statement of work clearly stating responsibilities.

16. We have scope creep that costs us money and customer satisfaction.

Scope creep occurs when little changes sneak up on you and snowball, causes projects to take longer to complete, resulting in cost overages, shrinking margins and sometimes a lost customer. Scope creep happens because a customer asks for one more small items or you forgot to note something like a service pack may not be included in software. SalesDoc Architect uses rules and workflows to ensure nothing is left to chance or falls through the cracks. When changes are made in one place of the quote file, those changes flow through to other related areas catching potentially costly changes to the project scope.

17. We can't deliver on what was promised.

When it comes time for implementation, you realize your team can't deliver on what was proposed. Erroneous assumptions may have been made or operations had no visibility to approve what was proposed and scoped. With SalesDoc Architect's rules and workflows, answers to pre-defined questions could reveal a need for further assessment. Workflow rules can be programmed to require operational approval under certain that ensure your team delivers on promises made before you and by you.

Are you ready to sell more in less time?

www.CorsPro.com contact@corspro.com



18. Change orders are prevalent, leading to customer dissatisfaction due to a perceived “nickel and dime” approach.

When you don't clearly gather all the requirements upfront or if changes aren't communicated to the design team, omissions and mistakes will occur at the time of implementation. This leads to a very dissatisfied customer. SalesDoc Architect automates the process to ensure that the proper information is gathered then uses this information to automate the configuration process, lessening the chance of mistakes or omissions – and the need for change orders.

19. Customer expectations do not match what is delivered.

A lack of in-depth qualification and discovery; a lack of collaboration amongst the team, or errors made when manual changes are made can lead to important items being omitted from the final proposal and statement of work. When this happens, expectations go unmet. SalesDoc Architect uses rules and workflows ensuring that requirements are fully identified, minimizing the chance of incomplete or inaccurate proposals and statements of work going out the door.

20. Projects are over budget and end up at a less-than-projected project margin.

When you see the disturbing trend of over-budget projects and major scope creep, it's time to look at your pre-sales process. Many times, this is an indication of sales not following the rules set by management or solutions not being properly configured and approved. SalesDoc Architect's workflows are customized to the way you do business, so nothing is left to chance or falls through the cracks.

Are you ready to sell more in less time?

www.CorsPro.com contact@corspro.com