



A Guide to Automating Four Key Areas in the Sales Process

Using SalesDoc Architect
and All-at-Once Automation

Area 1: Automate Sales Discovery Questions

Automation based on rules and workflows created in Excel guides the discovery process. Arm your sales team with the correct questions to ask for various situations to eliminate human error and omissions.

SalesDoc Architect allows for a deeper dive into the heart of the matter and to explore a customer's pain points. Generally, these questions are more technical in nature focusing on items related to:

- the network (e.g., servers and workstations)
- the need for a network assessment or who will manage the network
- the communications systems (e.g., trunking, stations, applications and support)

The screenshot displays the SDA Discovery Module interface. On the left, the 'General Discovery' form includes fields for 'Discovery session date' (7/20/2018), 'Number of locations' (3), 'Data network manager' (Customer), 'Installation expedite required' (No), 'Site survey needed' (Yes), 'Locations out of company footprint' (0), 'Union labor required' (No), 'After hours cutover' (Yes), and 'Double-time cutover' (No). The center section features a 'Network' table with columns for 'Servers', 'Primary server manufacturer', 'Average age of servers', 'Primary network infrastructure manufacturer', 'Server anti-virus software', 'Workstations', 'Primary desktop PC manufacturer', 'Average workstation age', 'Workstation operating system', and 'Workstation anti-virus software'. The right section shows a 'Project Discovery' memo with fields for 'Company Name' (Tilly Motors), 'Contact' (Leo Tilly, President), and 'E-mail' (lilly@tilymotors.com). The memo text includes a thank you note, a summary of issues identified during the discovery process, and a list of needs and requirements. A green arrow points from the 'Discovery' tab in the bottom navigation bar to the memo.

General Discovery

Field	Value
Discovery session date	7/20/2018
Number of locations	3
Data network manager	Customer
Installation expedite required	No
Site survey needed	Yes
Locations out of company footprint	0
Union labor required	No
After hours cutover	Yes
Double-time cutover	No

Network

Servers	Qty
Primary server manufacturer: Dell	3
Average age of servers: 10	
Primary network infrastructure manufacturer:	
Server anti-virus software:	
Workstations	
Primary desktop PC manufacturer: Dell	300
Average workstation age: 5	
Workstation operating system:	
Workstation anti-virus software:	

Project Discovery

Company Name: Tilly Motors
Contact: Leo Tilly, President
E-mail: lilly@tilymotors.com

Thank you for meeting with me the other day to discuss what you're looking to do. Based on our discussions, I've put together a summary of the issues, needs and requirements that I heard during our session together. Please review all elements below and let me know if you have any changes to make.

During the discovery process, we identified the following issues:

- The network does not support Quality of Service (QoS)
- Network administration is difficult
- Unaware of status and availability of employees
- Cannot process calls across multiple locations seamlessly
- Employees can't easily collaborate via web/audio

We also identified the following needs and requirements:

- Quality of service prioritization
- Integration of phone system with CRM/ERP solution
- Unified messaging with text-to-speech
- Web/audio collaboration for online meetings/webinars

We use this Project Discovery to reflect back to you what we heard are your needs and requirements. Please let us know if you have any suggested changes, additions or deletions.

Once you've reviewed and commented on this document, please sign and fax it to XXX-XXX-XXXX.

Sincerely,
Susan Dealer/closer

Signature: _____ Date: _____

SDA Discovery Module to Project Discovery Memo

Using Excel rules, additional questions can require answers based on previous selections. The information from the Detailed Discovery will then flow into letters or memos, an appendix to the proposal, and/or the statement of work.

Area 2: Automate the Executive Summary

Often overlooked, the Executive Summary can be the hardest thing to write but one of the most important parts of a proposals.

Creating a formal process that resides in SalesDoc Architect means salespeople are less likely to forget to ask the pertinent questions that uncover a customer's needs and requirements. By automating this process and asking these questions upfront you:

- lay the foundation for a long-term relationship
- have the blueprints for architecting the right solution based on customer insight
- gain a competitive advantage; active listening allows you to focus on deeper areas of pain that others can miss
- demonstrate your skillset by tying solutions back to pains and objectives

The screenshot displays the SDA Qualification Module interface. On the left, a list of qualification questions is shown, including 'Company Background', 'Issues and Areas of Pain', and 'Journey (Customer vision for the future)'. A green arrow points from the 'Executive Summary' section of this list to the right-hand pane. The right-hand pane, titled 'Proposal - Tilly Motors', shows the generated Executive Summary text. The text includes a paragraph about Tilly Motors' locations, a bulleted list of issues identified during the discovery process, a paragraph about the customer's vision for seamless service, and a bulleted list of needs and requirements. The bottom of the interface shows tabs for 'Base Info', 'Pricing', 'Qualification', 'MiscProd', and 'Write-in'.

SDA Qualification Module to Proposal Executive Summary

Once questions are answered in SDA, they can be programmed to automatically create an Executive Summary covering the *five key areas of a powerful executive summary*.

Area 3: Automate Configurations

You can create configurations using manufacturers or distributors tools. But how do you marry the two or include ad hoc professional services and applications that are interdependent of each other?

SalesDoc Architect's dynamic content creator functionality can:

- Drive solution configuration based on answers to a list of discovery questions
- All-at-once automate product configuration, labor configuration, proposal content and statement of work content based on answers to discovery questions

The screenshot displays the SalesDoc Architect interface, showing the flow from Dynamic Discovery to Dynamic Hosted configuration. The interface is divided into several sections:

- Dynamic Discovery & Scope of Work:** This section contains discovery questions and their answers. For example, "Discovery session date" is "March 11, 2019", "Number of locations" is "2", "Data network manager" is "Seller", and "Site locations table" is empty.
- System Requirements:** This section lists various system requirements and their quantities. For example, "Total Number of Users" is 37, "Number of Standard Users" is 25, "Number of Agents" is 10, "Number of Supervisors" is 2, "Conference Room Phones" is 2, "6 Line Phones" is 0, "16 Line Phones" is 0, "Wireless Stations" is 0, "SIP Channels" is 10, "PRI Circuits" is 15, "Analog Trunks" is 0, and "Wireless Stations" is 0.
- Other System Requirements:** This section lists other system requirements and their quantities. For example, "Standard Network Approach" is "Yes", "Switch Type" is "Customer Provided", and "Number of POE ports requested" is 39.
- Dynamic Discovery:** This section shows the results of the dynamic discovery process, including the "Include" and "Content" columns. Red arrows indicate the flow from the "Include" column to the "Content" column.
- Dynamic Hosted:** This section shows the results of the dynamic hosted process, including the "Include" and "Content" columns. Red arrows indicate the flow from the "Include" column to the "Content" column.

At the bottom of the interface, there are tabs for "Base Info", "Pricing", "Qualification", "Dynamic Discovery", "Dynamic Hosted", "MiscProd", and "Write-In". The "Dynamic Discovery" and "Dynamic Hosted" tabs are highlighted with red circles and arrows, indicating the flow between them.

Changes in one module flow directly to another module and output

Using SDA's inherent automation, administrators set up "stock" content elements and program configuration rules. Changes to a basic configuration are programmed to flow through and update items such as application settings, hardware requirements, labor hours, pricing and professional services.

Area 4: Automate the Proposal and Statement of Work

All your customer information and configuration is formatted and included in the SDA Quote file. The quote file becomes the central receptacle for configuration, labor, output content, etc. By modifying the fields in your SalesDoc Architect quote file and making use of SDA's dynamic content creator, you only have one area to make the changes. Those changes then flow through to update pricing, content, and documentation. So, when your customer decides it's a better idea for you to handle the network, you aren't stuck remembering to add that to the updated proposal and SOW.

The screenshot displays the SDA Discovery Module interface, which is used to generate a customized Statement of Work (SOW). The interface is divided into two main sections: a table of system requirements and a corresponding SOW document.

System Requirements Table:

Category	Item	Qty
Station Information	Total Number of Users	17
	Number of Standard Users	10
	Number of Agents	5
	Number of Supervisors	2
	Conference Room Phones	3
	6 Line Phones	0
	16 Line Phones	0
	Wireless Stations	12
	Trunking Information	
	SIP Channels	5
PRI Circuits	0	
Analog Trunks	0	
** does not include extending demarcation		
0		
Other System Requirements	Network Information	
	Standard Network Approach	Yes
	Switch Type	Adtran
	Number of POE ports configured	32
	Number of POE ports requested	1
	Number of POE ports provided	12
	Network Diagram	
	Insert Network Diagram	No
	<Link to Diagram>	
	0	

Customized SOW Document:

The SOW document is titled "Proposal and Statement of Work - Tilly" and includes the following sections:

- Services and Deliverables - Terrific Technologies, Inc.**
 - Outlined below is a complete description of all services that will be provided by Terrific. All services are based on the Schedule of Equipment and Services attached below in this SOW.
- Scope of Work Detail**
 - The discovery session with Tilly took place on 10/15/18.
 - 1 total location will be included in the solution.
 - Terrific will be the data network manager.
- Station Information**
 - Total Number of Users (17) included
 - Number of Standard Users (10) included
 - Number of Agents (5) included
 - Number of Supervisors (2) included
 - Conference Room Phones (3) included
 - Wireless Stations (12) included
- Trunking Information**
 - SIP Channels (5) included
 - PRI Circuits (0) included
 - ** does not include extending demarcation
- Network Information**
 - Our standard approach to include a Network Assessment, and work assumes proper security, access, and customer support as required.
 - Switch Type (Adtran) included
 - Number of POE ports configured (32) included
 - Number of POE ports requested (1) included
 - Number of POE ports provided (12) included

Information from SDA Discovery Module is outputted into customized SOW

In the end you want to present your customer with a fully-customized proposal and statement of work that speaks to the customer's needs. You want to amp up the user experience and make them excited to work with you – all while saving you time and protecting your margins.

Automating Four Key Areas from Discovery to Implementation

By automating the first stage of the sales process - Discovery - you no longer need to rely on your memory or informal notes that somehow no longer make sense when you return to the office to start on the configuration, proposal and statement of work.

Automate these four areas using SalesDoc Architect to experience all-at-once automation for faster proposal and statement of work generation resulting in higher margins.

- Discovery questions
- The executive summary
- Configurations (including estimated labor hours)
- Proposal and Statement of Work

Click the screenshot below or go to <https://www.corspro.com/discovery-driven-automation> to see SalesDoc Architect's discovery-driven automation for technology proposals and statements of work in action.



Contact us to learn more at
<https://www.corspro.com/contact-us>