

A Guide to Automating Four Key Areas in the Sales Process

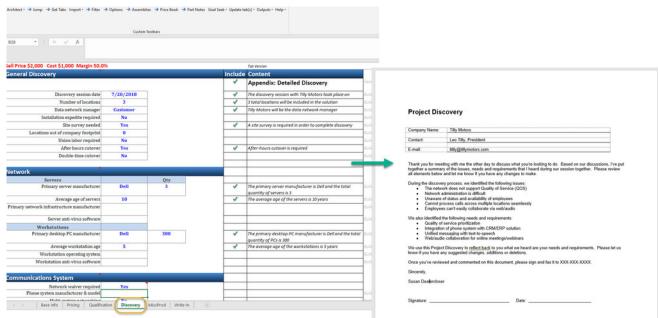
Using SalesDoc Architect and All-at-Once Automation

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)



SDA Discovery Module to Project Discovery Memo

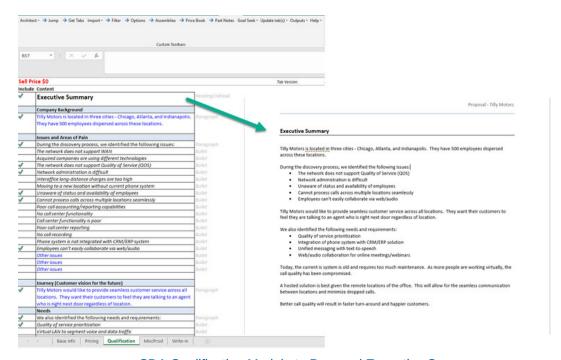
Using Excel rules, additional questions can require answers based on previous selections. The information from the Detailed Discovery will then flow into letters or memos, an appendix to the proposal, and/or the statement of work.

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



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

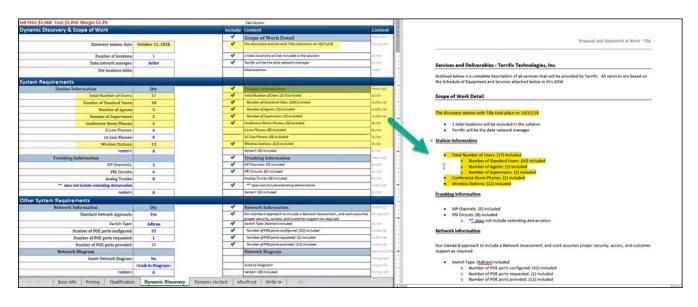


Changes in one module flow directly to another module and output

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.



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-atonce 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