



Company

- Headquartered in Midland, MI
- Wholly-owned entity of Dow Corning
- Specializes in business IT infrastructure, systems, end-points and applications
- Top Mitel Reseller, Cisco VAR

Challenge

- Required: proposal tool to complement their new Tigerpaw CRM implementation
- Free-up salespeople for customer-based activities and selling
- Limited time to devote to implementation and training

Solution

- SalesDoc Architect from Cors Productivity Solutions, Inc., with managed services functionality and subscription for Mitel proposal content
- Seamless integration between Tigerpaw and SalesDoc Architect
- Ability to import data from Mitel Sales Workbench, Tech Data and Anixter configuration/ordering tools

Benefits

- Quick implementation, with minimal disruption
- 56% increase in proposal throughput
- Greater accuracy
- Significant sales efficiency gains
- Enhancement of Tigerpaw CRM

Embracing Change for Significant Sales Gains

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2011 was a busy year for Site Services, Inc (SSI), a full service solution provider of business IT infrastructure, systems, endpoints and applications, operating in Midland, Michigan since 1986. In late 2010, executive management at SSI decided to tighten the scope of their data offerings and focus more closely on Managed and On-Demand services for existing and new clients. To support the change, they launched a major rebranding initiative in early 2011 to better highlight their capabilities and transition current customers from a T&M (time and materials) approach to managed services. Following the successful transition among current clients, SSI launched a campaign to market managed services to new clients.

At the same time as the rebranding campaign, SSI also decided to implement a new back-office software system from Tigerpaw Software in order to better execute the sales and operations tasks associated with the launch of the

new managed services portfolio. The software implementation was a significant undertaking, and SSI devoted the first half of 2011 to the effort, with full cut-over to the new Tigerpaw system taking place in May.

Needed: A Total Sales Solution with Tigerpaw

SSI's Marketing & Sales Group Leader, Jennifer Ouderkirk, saw an opportunity during the start of the Tigerpaw system implementation to address the existing inefficiencies that her sales team struggled with when putting together solution proposals. Sandwiched in between the selling process for the new managed services portfolio and the promise of state-of-the-art ordering and service delivery capabilities from Tigerpaw was a semi-manual, inefficient proposal generation process. Ouderkirk wanted the sales team to be able to spend less time quote-writing and more time building relationships with clients and prospective clients. The existing process they used consisted of a

Word template and Excel with macros to generate proposals. Since these tools were not tied together and had no automation features, the entire process was cumbersome and left a considerable amount of room open for costly sales errors and omissions. Ouderkirk wanted something better -- a tool that would tie in with Tigerpaw, free up the sales team from paperwork and help them focus on selling.

believes that it was the right decision. SSI was able to immediately enjoy the productivity benefits of SalesDoc Architect, which took only days to implement, instead of waiting for the more extensive Tigerpaw implementation to be complete. "We went with a basic implementation of SalesDoc Architect, so that we could concentrate on Tigerpaw. CorsPro was there to hold our hand,

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SalesDoc Architect: Quick Implementation with Immediate Benefits

Ouderkirk had seen CorsPro exhibiting at vendor showcases during recent Tigerpaw and Mitel conferences, and knew that SalesDoc Architect offered tight integration to Tigerpaw as well as automated configuration and proposal content for Mitel. "The fact that SalesDoc Architect had substantial integration functionality and content for vendors that we use was definitely a plus in our minds," said Ouderkirk. "We wanted a tool that would complement our existing business tools and offerings, and since we sell Mitel-based IP telephony solutions and were in the midst of a Tigerpaw implementation, it felt like a natural fit." SSI decided to implement SalesDoc Architect at the same time as the Tigerpaw implementation in order to face the learning curve for both systems simultaneously and realize Ouderkirk's goal for a Total Solution.

Although a concurrent implementation of two new systems was a big mouthful to chew, Ouderkirk

and right out of the gate our proposals were better and efficiency was significantly improved. Now we're working with CorsPro to unleash more of SalesDoc Architect's functionality that we haven't tapped into yet."

Leveraging Integrations and Content

With SalesDoc Architect in place and after the Tigerpaw implementation was completed mid-year, SSI began to focus on taking deeper advantage of the tight integration between the two systems. Alyssa Hulett, a sales team member at SSI, found that the front-end integration -- the import feature from Tigerpaw to SalesDoc Architect -- has been a key driver for increased efficiency and has helped them reduce quoting errors. "Being able to start a quote in Tigerpaw and then merge the customer information directly into SalesDoc Architect is amazing -- it saves us so much time. We can get a proposal started quickly and then push information back into Tigerpaw for ordering after the sale is complete -- all without re-keying any of the information."

In addition to the Tigerpaw integrations, SalesDoc Architect's ability to import data from the Mitel Sales Workbench has been particularly effective in reducing common quoting errors that have plagued SSI in the past. Ouderkirk explains that before SalesDoc Architect, salespeople would mistakenly list the unit cost instead of the extended cost for an item with a multiple quantity in the order. "These types of mistakes can really add up. By importing directly from Sales Workbench, the risk of error is minimized and our cost goes down." The same is true for import functionality from parts/pricing tools from SSI distributor partners Anixter and Tech Data. "This automated approach protects us from vendor and distributor mistakes as well as internal error, because we can save the outputs and show the vendor or distributor the transaction to identify an error on their end."

Clients are happy and new clients are pleasantly surprised at our level of commitment."

The content and overall quality of SSI proposals has improved as well. SSI utilizes CorsPro's monthly subscription service for up-to-date proposal content for proposing Mitel telephony systems. Ouderkirk is so pleased with the content and automated configuration functionality for Mitel and the comprehensive proposals they are able to generate that she has plans to add more content for other SSI disciplines, including their data solutions.

Better Throughput and Faster Turnaround

Since implementing SalesDoc Architect, SSI's proposal throughput has increased significantly. The number of proposals that were provided to customers monthly went from 25 in June of 2011 to

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The integrations and automation features in SalesDoc Architect have also given SSI the confidence to delegate the day-to-day quoting tasks and free-up sales team members like Hulett to spend more time with customers and prospects. "Now that we have SalesDoc Architect, I've been able to be on-site for quality checks during customer implementations to make sure that our customers know how important they are to us.

39 in August, a 56% increase over a two month time frame. "I believe that the increase in proposals going out the door has been a result not of increased demand but of productivity gains from our newly integrated sales process," notes Ouderkirk. "Our process is more efficient, so we're able to create more proposals, and get them to customers more quickly as well." Before SalesDoc Architect, the turnaround time to get a proposal

into customer hands took about a week. Ouderkirk estimates that now the turnaround is approximately 1 or 2 days, depending on the complexity of the solution. Even users without a lot of product knowledge can create quotes and

Tigerpaw and SalesDoc Architect would give them significant efficiencies and cost savings. From a practical perspective, the decision not to wait until after the Tigerpaw cutover to implement SalesDoc Architect allowed them to get comfortable with

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proposals because SalesDoc Architect's automation features help to fool-proof the process by ensuring accuracy and providing consistent, quality content.

SSI customers are pleased with the quality of the new proposals that SSI is producing, and as a result the company has seen their proposal win rate increasing. "The Mitel proposal content has been hugely well received by our clients and prospective clients," says Ouderkirk. "And the managed services content is great -- the way it's built helps reduce the risk point of doing things incorrectly for us, and for our customers it lays out the terms succinctly so they fully understand the breadth of our services."

20/20 Hindsight: Not Delaying SalesDoc Architect was a Great Decision

SSI's decision to implement SalesDoc Architect in the midst of two major business initiatives was both strategic and practical. Long term, Ouderkirk knew that integrating the sales process with

their new proposal tool in anticipation of the new integrated process with Tigerpaw. Ouderkirk did the math, and realized that the labor savings would more than cover the cost of SalesDoc Architect, with the promise of even greater savings when both systems were tied together.

What's next?

With the newly integrated sales process up and running successfully, Ouderkirk and her team have had a chance to see the value of what SalesDoc Architect has brought to their business and they are ready to tap into more SalesDoc Architect features and functionality. Ouderkirk keeps a list of what SSI would like to do with SalesDoc Architect so that she can continue to improve the company's workflow, proposals and other sales documents. "With CorsPro, we are listened to and asked how we are going to use the tool, so it is very beneficial to us." So far they have customized the options functionality to present more solutions choices to their clients, and have plans to

implement an internal quote request form into SalesDoc Architect so that they can further empower administrators to manage proposal generation. "We are still learning about SalesDoc Architect and all of the functionality that is available to us now. From the wonderful things we've been able to accomplish with it so far, I think we have a lot more efficiency and productivity gains ahead with SalesDoc Architect."

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About Cors Productivity Solutions

Founded in 2003, Cors Productivity Solutions provides document automation software for sales operations. It is a privately owned and operated company that is headquartered in Reston, VA. With CorsPro's SalesDoc Architect, users can generate turnkey product configurations, price quotations and fully customized proposals from scratch within minutes. For more information about SalesDoc Architect, contact CorsPro at 888-297-8845 or visit www.corspro.com.