

# solutioninfo



## DocuWare for Sales

### More Revenue, More Satisfied Customers

*Exceeding goals is tough in competitive times. Sales teams are fighting against time as much as they are for customers. It all revolves around information and who can use it the most efficiently. That's where DocuWare comes in.*

Key Account Managers must be able to handle a wide variety of issues, for a broad category of customers. "Road Warriors" are bombarded with questions, while the staff back in the home office scrambles to address them. A customer looks for answers on a company's Internet site. Yes, successful sales depend on quick access to information.

With an electronic customer folder, it's guaranteed: any inquiry coming from existing and potential customers can be handled on the telephone. No need for long searches and unnecessary call-backs. Processes from generating proposals all the way to handling product complaints become significantly more efficient. Employees have more time for strategic work, while administrative tasks are either eliminated or streamlined. This means bonus time for more, higher-quality proposals. Existing customers profit from better support. The natural results: satisfied customers and motivated employees. And the ability to call up the right document at the right time - that's also known as a handy competitive edge!

#### ■ Inner-Office Communication

Unfortunately, in the real world, sales people often seem to be the "last to know." Only a well-informed sales person is able to approach customers with confidence and inspire the same in your company's products and services. Easily accessible records and marketing materials play a large part in forming this information basis.

#### ■ Information for Customers

Now accustomed to the Internet, customers today demand quick and easy access to current documents, records, etc. If all of your documents are stored in a central document pool, and customers can access them via the Internet...again, that's a nice advantage over your competition.

#### Faster with DocuWare

DocuWare guarantees higher productivity. Decentral and simultaneous work - on something like a RFP - is possible. Information stays current for internal/external employees and customers alike. Necessary controls and authorization processes are streamlined. Everything is geared to the customer.

### Benefits of DocuWare

- Quicker Processing Times
- Faster Information Retrieval
- Increased Time for New Sales
- More efficient Sales Cycle
- Sharper Competitive Edge
- Better Customer Service

### DocuWare - Software for Integrated Document Management

The DocuWare DMS takes documents of any format and from any source and stores them in one central document pool - contracts, letters, price lists, notes, files or e-mail...you name it. With DocuWare, these documents can be scanned, indexed, filed, viewed, edited, printed, faxed and e-mailed. And with the help of the Internet, you can access these documents from anywhere, at any time (as long as you are authorized!).

# The Processes

## Inner-Office Communication

### ■ Sales Management and Goal Setting

Friday afternoon in the office of a sales director: Which orders were booked this week, did the numbers come together? No news from Accounting, and access to the order processing program is denied. Plus, reports expected from salespeople in the field haven't arrived yet.

### Benefits with DocuWare

With an electronic sales folder you can group together all kinds of information, which can be specially stored or sent by e-mail. This folder contains links to all of these relevant documents - for example: proposals, contracts, records - so that access to the most current version of these documents is guaranteed. As soon as new documents, that fulfill the criteria used to set up the folder, are added to the archive, their links will appear. No need to keep looking for information - all the latest & greatest will find its way to you.

### ■ Generating Proposals

An inquiry for a proposal needs addressing. An existing customer wants a price today for next year's budget. Where is the current data sheet, current specs, current price list? What file contains the final contract, what special pricing agreements were made last year? It's a long way between writing and authorizing a proposal...sometimes longer than what was initially promised to the customer. Salespeople are on the phone, trying to speed matters up internally, rather than spending more time brainstorming with the customer. Lots of information is still found on paper, the CRM system is only marginally helpful.

### Benefits with DocuWare

By integrating a document management system, all of this information is available to everyone. Long searches through a variety of binders and filing cabinets is a thing of the past. The process for creating proposals is actively managed, and the efficiency in the sales department grows infinitely.



## Information for Customers

### ■ Customer Service

Customers profit from online access to important information from their sales partners. This might include packing slips, invoices, service and support agreements, and much more. Shorter innovation cycles and the now-required, quick response times make it tough to keep up with the business of supplying accurate information.

### Benefits with DocuWare

With DocuWare, you can supply your employees in-house, those working in the field, sales partners, existing and potential customers with exactly the information they need. The key, once again, is the DocuWare document pool in which various documents and details are always at hand. A service program that provides this kind of access...just wait for the positive feedback you'll get from your clients!

Result list - SALES - 10 Hit(s)

	Customer	Customer num	Contact	Document type	Subject/Doc number
f	AUDIO CONFERENCES	928.380	KARA WESTON	INCOMING MAIL	CREATIVE CLICKS
	CONTRON	92.067	TOM SMITH	INVOICE	79487
	DIGITAL STORAGE	928.456	JOHN BROWN	INCOMING FAX	NEW ADDRESSES
	DOCUSOURCE	928.374	RAY SANCHEZ	ORDER	OFFICE TECHNOLOGY
	DOCUWARE CORPORATION	928.376	MARY WILLIMAS	OUTGOING LETTER	SALES TRAINING
f	DOCUWARE CORPORATION	928.385	KARA WESTON	RELEASE NOTES	NEW FEATURES
	DOCUWARE CORPORATION	928.676	SUPPORT TEAM	OUTGOING LETTER	CONTENT-FOLDER
	FEDDEX	928.392	MARY WILLIMAS	OUTGOING LETTER	SHIPMENT
	GREEN CORP.	945	PETER MILLER	DELIVERY NOTE	HARDWARE

Settings End

*An electronic customer folder contains all of the most current information about a specific customer... available with a few mouse clicks*

## Getting the Order - Even Faster

To specifically access all of a customer's information, your index (database) fields are set up to include customer name and number, contact name, subject, date and document type. Every sales partner is now able to view only their customer's information. Type in the contact name and...instantly...up comes this customer's entire history. Since all of this information is kept in one system, there is no need to worry that something might be missing. And there won't be any surprises during that next meeting with the client! Any questions can be quickly and professionally answered. Customer service...done the right way.

## Complete Customer Information - By Mouse Click

Good preparation for an upcoming sales meeting is the first step to getting the order. DocuWare provides everything you need for your research, all in electronic customer folders. Anything generated in Microsoft Office - such as letters, spreadsheets and presentations - are all stored in the document pool. DocuWare TIFFMAKER and DocuWare Office Add-In are at hand to help with quick indexing and storage. Out of your e-mail program, DocuWare automatically incorporates all incoming and outgoing e-mail. Order Processing/Accounting adds its array of orders and invoices to the mix. And contracts? Well, they are scanned and safely filed in the same system. It's easy to have access to important information once it's all in a central document pool. The various options for automating the indexing and storage process - it's what makes DocuWare the streamlining specialist.



## Real World SIGMA Financial

*This financial broker dealer processes financial sales forms from its network of over 1400 sales reps. The Compliance, Sales Processing and the Commission departments' workflow have been streamlined - all with the help of DocuWare. Sales forms are now received via fax and are automatically indexed and electronically stored.*

*This, plus quick access to information, is the basis for the company's new efficiencies. For the sales reps, the new system saves time and money.*

Previously, Sigma's reps mailed the original sales form to the office for review. The workflow consisted of copying each form, processing both the copy and the original, filing the copy and mailing the original to the appropriate fund company. Sigma would need to add additional



personnel and filing space, unless they adopted a document management system.

Today, each form and a standardized coversheet are faxed to the office and automatically indexed.

Document processing is done in hours instead of days and the original form no longer needs to be mailed to the corporate office. Sigma has saved \$10,000 a month by reducing paper, toner and overnight mailing costs. Business has tripled without the need to add personnel, responding to audits is easier and customer service has improved.

**Challenge:** Develop a faster and more efficient way to process sales orders, faster response to customer inquiries, reduce storage space and document shipping costs, and improve overall document control

**Solution:** DocuWare, ACTIVE IMPORT and CDMAKER

**Benefits:** Sales growth without adding employees; enhanced customer service; gained competitive advantage; able to attract high-caliber new sales reps



**Terry DeLongchamp,  
IT Director for Sigma  
Financial**

*"Since implementing DocuWare our sales reps have saved two days of processing time. All sales forms submitted by 4:00 p.m. are reviewed and processed the same day. Since the compliance review and notification are so quick, the original sales form does not need to be mailed to the fund company in an overnight envelope, resulting in a trickle down cost savings for the rep."*

For more information please visit our website at [www.docuware.com](http://www.docuware.com)