

Automating the Sales Quoting Process Leads to Improved Customer Experience and On-boarding for UK-Based Promotional Company



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QuoteWerks enables sales to spend more time building relationships and delivering what the customer wants most.

Situation

From the potential customer's perspective, consider what is most important to him; getting what he wants, when he wants it, at the best possible price. How well does your organization deliver on this critical, and often decisive need of a prospective new client? Craigdon Business Gifts asked this very question and quickly found that their manual sales quoting process was hindering the company's ability to meet the needs of their growing prospective client base. Changes were needed if Craigdon Business Gifts (CBG) was to maintain its service delivery standards and market leadership role in an increasingly competitive marketplace.

Customer Profile

Craigdon Business Gifts, a division of Langstane Press Ltd., has been serving the promotional advertising needs of business and organizations of all sizes and industries for 35 years. This UK-based company has developed profitable customer relationships throughout much of the United Kingdom and Scotland; and continues to add new customers daily, allowing the firm to become a leader in the marketplace. Since its inception in 1973, CBG has taken great pride in serving its customers by using a standardized, albeit manual, sales process.

Business Challenge

Having served its customer base for over 30 years, Craigdon Business gifts had become a leader in the promotional advertising industry throughout the region. This growth was presenting a new challenge to the company: how does it keep up with the growing demand for sales quotes when the quoting process is manual and prone to human error. Delays and errors in responding to quote requests could, if not addressed, lead to profit margin erosion and customer service issues.

Furthermore, over the last decade, competition in the promotional products space has increased, causing many firms to either refine their processes in order to become more agile and customer centric, or face the loss of market share.

Solution Overview

Customer Profile

35 year-old, UK-based purveyor of promotional items and business gifts to clients throughout the region.

In an increasingly competitive market, the company needed to find alternatives to its manual sales quoting process which was both time consuming and prone to human error.

Objectives

Deliver a scalable quoting solution that would directly and immediately improve the sales quoting process and ultimately the customer experience. The project had to be able to produce quotes, orders, and invoices while not forcing the company to realign its entire sales and sales support work flows.

Solution

- QuoteWerks Corporate Edition
- QuoteWerks Layout Designer (included in all editions)

Third Party Tools

- SQL Server 2005 Express

Prospects are impressed when you can deliver detailed, accurate quotes in moments. You cannot do that if you have to dig through product and price lists while also awaiting replies to emails and phone messages about product availability, manufacturer incentives, and payment terms.

Objectives

Having identified the existing sales quoting process as a potential hindrance to CBG's future customer service and on-boarding objectives, the company set out to identify and deploy a sales quoting solution that would have the ability to process large volumes of sales inquiries and orders more efficiently. CBG also wanted to ensure that its IT investment was scalable, capable of supporting custom reporting needs, and would not require changes to existing IT infrastructure and sales procedures as they relate to the established CBG sales cycle.

Finding the Right QuoteWerks Partner

To assist them, CBG retained the services of Hilltops IT, a UK-based technology firm and QuoteWerks Solution Partner, to assist them in the identification and selection of a sales quoting application. With Hilltops' focus on delivering complete IT and software services to the SMB market, CBG realized the value in partnering with a reseller who could provide local support and who understood and appreciated CBG's business processes and model, budgetary demands, and future goals, all of which would drive the requirements for the company's new sales quoting application.

Solution

Originally, CBG deployed the Professional Edition of QuoteWerks with the assistance of Hilltops IT. However, given their ongoing growth, the company quickly realized that the volume of quotes, orders, and invoices generated in QuoteWerks required a more robust solution. After further consulting with Hilltops, the company opted to upgrade QuoteWerks to the Corporate Edition since it would enable the company to utilize a scalable SQL Server backend.

The speed and accuracy of the quote or proposal will demonstrate the organization's commitment to addressing requests in a timely manner. This not only gives the prospect what they want, but it sets the sales rep and the company apart from the competition thus giving you an advantage in winning the business.

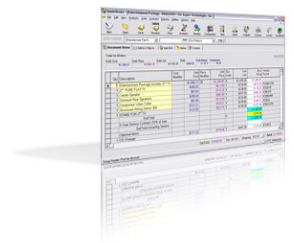
Celebrating 15 Years of Excellence

Benefits

- Extensive automation of the sales quotation process.
- Increased quoting accuracy reducing both errors and customer recovery efforts.
- Real-time visibility into customer and new business on-boarding.
- Reduced response times.
- Automatic inclusion of supporting sales collateral with the quote.
- Increased sales productivity and efficiencies.
- Enhanced quote layout options for professional looking quotes.
- Rapid and efficient quote submission and tracking.

"The introduction of QuoteWerks has meant a vast improvement in the level of service Craigdon Business Gifts provides to its customers. Providing a fast and efficient service for our clients is fundamental for sustaining the long term growth of our business. We are committed to embracing current technologies to assist us in our business goals."

Patrick Malone
General Manager
Craigdon Business Gifts



Results and Benefits

With the upgrade deployed, CBG has realized an immediate and even greater improvement to their sales quoting process. Stephen Siggs, managing director and owner of Hilltops IT, summarizes the QuoteWerks value by simply stating, "QuoteWerks had a massive and beneficial impact on the users' productivity."

According to Patrick Malone, General Manager for CBG, "the introduction of QuoteWerks has meant a vast improvement in the level of service Craigdon Business Gifts provides to its customers. Providing a fast and efficient service for our clients is fundamental for sustaining the long term growth of our business. We are committed to embracing current technologies to assist us in our business goals."

For More Information

For more information about Craigdon Business Gifts, please visit:

www.craigdonbusinessgifts.com

For more information about Hilltops IT and the services it provides to companies in the UK, please visit:

www.hilltopsit.co.uk

To access a demo version of QuoteWerks, go to:

<http://www.quotewerks.com/reqdemo.asp>

For more information (outside the UK), call the QuoteWerks Sales Team at:

+ 1 407 248 1481 or email us at sales@quotewerks.com

For more information in the United Kingdom contact the QuoteWerks authorized distributor Link47 Ltd at:

+ 44 (0) 1376 552929 or email them at sales@link47.com

"QuoteWerks had a massive and beneficial impact on the users' productivity."

Stephen Siggs
Managing Director & Owner
Hilltops IT

QuoteWerks Sales Partner Profile



Hilltops IT was established in 2005 to provide software services and solutions to small and medium sized businesses. Hilltops IT specialises in delivering end-to-end contact management, quoting, ordering and invoicing systems and business intelligence solutions with "off the shelf" products backed up with expert consultancy, training and support services. Hilltops IT also has a proven track record in developing bespoke software solutions, software products, add-on utilities where "off the shelf" products do not completely fulfil a client's requirements and business intelligence solutions.

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