

Global Enterprise Seeks Quoting Solution That Provides Effective Centralization While Integrating With SalesLogix

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QuoteWerks Demonstrates Its Ability to Deliver Cost Effective, Flexible Solutions for Global Enterprises and Small Businesses Alike.

Situation

Summary

International provider of scientific and laboratory measurement devices with twelve sales offices worldwide, looks to SalesLogix and QuoteWerks to meet its expanding sales force and their demand for flexible, yet centralized quoting solutions as the company plans further expansion.

Customer Profile

TA Instruments is the most widely respected provider of thermal analysis, rheometer and microcalorimetry instruments to scientists and laboratories worldwide. Given the company's existing sales offices in twelve countries worldwide and future expansion planned for South America, the need for an integrated sales support system which provides both centralization and customization is paramount to the company's ability to effectively and efficiently manage its expanding sales operations.

Problem

Context

In recent years, the company's ongoing success and growth in global markets resulted in the need for improving various components of the company's sales infrastructure to include its CRM solution. The company decided upon SalesLogix by Sage Software for its CRM and deployed it by early fall 2004. With the implementation of SalesLogix came the obvious need to integrate SalesLogix with a quoting tool. Given the current system's inability to integrate with SalesLogix, the company opted to begin evaluating add-on quoting solutions that would deliver the necessary integration.

Managing the quoting process for twelve sales offices worldwide required TA Instruments to develop and utilize various templates in Microsoft Excel to support their



TA INSTRUMENTS

Solution Overview

Customer Profile

International provider of scientific and laboratory measurement devices with 12 sales offices worldwide and plans for further expansion in Latin America.

The challenge was finding a quoting solution that met a myriad of needs including centralized management of a flexible and customized sales process.

Objectives

Deliver a quoting solution that would meet with budgetary requirements of TA Instruments while providing a comprehensive feature set and integration with SalesLogix.

Solution

- QuoteWerks Professional Edition
- Remote Site and Remote User licenses
- Support for additional literature and spec sheets (included in all editions)
- QuoteWerks Layout Design Tool (included in all editions)

Third Party Tools

- SalesLogix by Sage Software

sales process. Since the current quoting solution could neither adequately support Excel, nor eliminate the need for Excel templates, TA Instruments decided that the quoting solution adopted, would need to also support Excel templates or eliminate the need for these altogether.

How does a growing, international business strike a balance between flexibility and centralization of its sales quoting process when deploying an integrated solution that links with the company's CRM system?

Objectives

The challenge was to source a software application that would not only integrate with SalesLogix, but also provide the balance between centralized control and management of the company's worldwide sales quoting process and flexibility to support local needs of its field sales offices which currently span 12 countries/regions and will expand further into Latin America in the near future.

Finding the Right Partner

Partnering with Aspire Technologies, Inc. (the creators of QuoteWerks), TA Instruments was able to achieve a level of integration with SalesLogix that was otherwise not available, while also delivering the additional features that the field sales force would require.

Solution

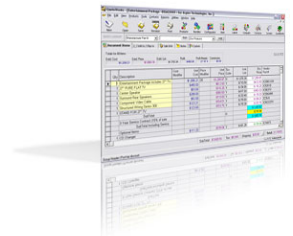
Process

In October 2004, QuoteWerks was identified as a potential quoting solution candidate based in part on the recommendation of a company sales representative who had used QuoteWerks in the past while with a previous employer. The evaluators were keen to observe QuoteWerks' ability to centralize the quoting support and management needs that TA Instruments had identified. With a remote sales force working in multiple countries around the world, TA Instruments was concerned about protecting the quality, accuracy, and consistency of its sales quotes. Their evaluation quickly demonstrated the ability of QuoteWerks to meet the following requirements:

- Integration with SalesLogix.
- Remote site and remote user support.
- Provide centralized administration of QuoteWerks and all product/pricing data ensuring consistency of quotes.
- Customizable layouts for quote documents with security to ensure document integrity.

Benefits

- Integrates with SalesLogix
- Remote Site and Remote User support allowing for the global deployment of QuoteWerks
- Provides centralized administration of QuoteWerks and all product/pricing data ensuring consistency of quotes.
- Customizable layouts for quote documents with security to ensure document integrity.
- Ability to include additional literature and spec sheets into the master PDF document.



- Ability to include additional literature and spec sheets into the master PDF document.
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QuoteWerks offers a fully-functioning demo edition for companies to fully evaluate the system and the benefits it offers. Companies requiring additional features such as real-time pricing and availability, or multi-user support can obtain trial keys from the QuoteWerks Sales Team.

Evaluation

Results and Benefits

Today, TA Instruments and their worldwide customers benefit from the streamlined quoting process provided by QuoteWerks Professional Edition. Through an integrative approach to sales automation, TA Instruments is assured that necessary sales data is accurately captured and reported both in the quote and in the company's CRM system. The company and its employees have been able to achieve the centralized control and consistency desired, while also delivering to sales a customized and easy to use quoting system ensuring that the sales teams spend less time processing their quotes and more time addressing the needs of the scientific and research communities.

For More Information

For more information about TA Instruments and its products, please visit <http://www.tainstruments.com>

To access the QuoteWerks demo edition using the World Wide Web, go to: <http://www.quotewerks.com/regdemo.asp>

For more information, call the QuoteWerks Sales Team at (407) 248-1481 or email us at sales@quotewerks.com

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