

GET A FANTASTIC SERVICES QUOTING TOOL

Persona		Scenario/Objective				
Puneet, 32, a diligent solutions engineer		Puneet works on creating scopes, timelines & estimates on daily basis. He needs a estimation tool that removes his overhead and frustration due to the slow process of using spreadsheets and waiting for finance approvals, which delays the validation of consistent labor pricing in estimations.				
		Search	Consider	Shortlist	Onboarding	Live
User Actions		Search on App Store Search on Google Reached out to friends & colleagues	Ask for budget, time & team to homegrow. Self acquire the Knowledge of external tools. Ask vendors for Demos Ask for vendors for Pricing	Create a matrix of pros/cons of each product. Understand the budget Identify the cost Vendor Analysis Support	Installation of PSC QuoteX in customers Instance. Configure PSC QuoteX using setup guide.. Train the users and Train the trainer.	Login Receives Quote Request. Create Estimate Collaborate Use Pricing Engine Reuse and build quote quickly
	Touchpoints	Website Banner Ad LinkedIn Promotion Whatsapp Promotion	Youtube Zoom/GoogleMeet Sales Decks Emails	In-Person meetings. Online meetings. Workshops	PSC QuoteX. Online Training. Online Help	Salesforce PSC QuoteX
Emotion						
Pain Points		Boring Spreadsheets/Excels Delayed Approvals Too much Back & Forth No Reusability	Finding the right tool takes time.	Budgetary & timeline concerns for homegrow tool. Whatif the homegrow tool doesn't work.		No Followup about product satisfaction.
Possible Solutions		Get a services estimation tool on licenses. Homegrow the tool & Automate.	Take recommendations from your peers in other organisation. Take recommendations from employees from their past experiences.	Procure the external tool licenses.		Send monthly customer experience survey/online meeting to better understand customer problems.