

CASE STUDY VORTEX

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VALUES



Read how Vortex sales team went from 8 hours per proposal to only 10 minutes, decreasing the time spent creating proposals by 980%. Click below to read the whole case study as I believe this could significantly impact how you do business.

The Situation

Creating proposals was very time consuming and took anywhere from 4-8 hours to create a single business proposal. Because creating a proposal was so time consuming, sometimes sales reps would not create a proposal for a prospective client that they thought was "iffy" and not a strong contender for buying. This led to many lost sales opportunities. The proposals they created were inconsistent in their appearance, their content, and their corporate brand message. Depending on which salesperson created a proposal, each proposal may have a different appearance, different content included in it, and a different corporate "voice." There was no consistency or uniformity in their business proposals. This reflected poorly on the company's brand image and overall sales message. Their proposals looked similar to the proposals of their competitors. Vortex was not being seen as unique and superior. Their proposals made them look like another "me too" company within their industry. The CEO of Vortex, Stephen Hamelin, decided that their current system for creating business proposals was too time intensive and inconsistent. Stephen wanted a proposal creation system that would automate much of their business proposal creation process while at the same time making their proposals consistent, accurate, and visually attractive for their brand image. He also wanted a solution that would work seamlessly with their CRM, Salesforce.com and, Paperless Proposal was able to connect to the Salesforce.com CRM system used by Vortex.

The Result

The time it took for a Vortex salesperson to create a professional business proposal was reduced from 8 hours down to 10 minutes, a 980% decrease in time spent creating proposals. This tremendous time savings allows the Vortex sales staff to be much more productive, focusing the majority of their time interacting with prospects and clients and selling instead of sitting in front of a computer to create business proposals. Because creating a business proposal was now so fast and easy, the sales reps stopped their past practice of only creating proposals for the better deals and now they create proposals for all opportunities, which has helped to increase sales and market share. Vortex business proposals now have a professional and consistent appearance, which has helped to build their brand and separate them from their competitors. The sales team is now able to easily create and add personalized video clips into each proposal. Adding personalized video clips into each proposal helped make Vortex stand out among their competitors and win more new business. Vortex has different proposal templates available to them based on if it is their internal sales team providing a prospective client a business proposal or if it is one of their distributors providing the business proposal. This flexibility in using different proposal templates depending on which distributor Vortex was working with made it very easy to create consistent and accurate business proposals across all sales channels, even when each of those sales channels has a different company name and brand image. Using Paperless Proposal, Vortex was able to automate data sharing between the Paperless Proposal platform and their Salesforce.com CRM system, which made it quick and easy for them to build, track, and manage all of their business proposals. For example, when creating a proposal, Paperless Proposal would automatically pull from the CRM and then paste all of the cut sheets and videos that relate to every single item quoted in the proposal. The ability for Paperless Proposal to connect to and automatically pull information from the Vortex CRM was one of the ways Vortex was able to cut down the time it took them to create a proposal from up to 8 hours to only 10 minutes, a 980% decrease in time spent creating proposals. Automating tedious manual tasks through CRM integration is one of the ways Paperless Proposal makes it fast and easy to create high quality and consistent proposals. As Vortex is an international company, they need to create proposals in different languages. Paperless Proposal automatically uses the correct proposal template and pulls documents in the correct language to make creating proposals in different languages fast and easy.



Easily transfer your CRM data into your proposals and automatically log all proposal activity back to the CRM. The proposal documents can then be customized with CRM data. Know when your proposals have been sent, viewed, and signed from within your CRM.

Contact Us for a Demo Today

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