



# DocuWare for Sales

SolutionInfo

**NASHUA** 

saving you time. saving you money. putting you first.

## 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 at head office scramble to address them. A customer looks for answers on the company website. Yes, successful sales depend on quick access to information. With an electronic customer folder, it's guaranteed: any inquiry from existing and potential customers can be handled on the telephone. No need for long searches and unnecessary callbacks. 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!



### Benefits of DocuWare

- Quicker processing times
- Faster information retrieval
- Increased time for new sales
- More efficient sales cycle
- Sharper competitive edge
- Better customer service

## Internal 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. Decentralised and simultaneous work - on something like a RFP - is possible. Information stays current for internal/external employees and customers alike. Necessary controls and authorisation processes are streamlined. Everything is geared to the customer.



## From documents to value

DocuWare enables any size organisation – in any industry – to transform documents into valuable capital. Regardless of format or source, DocuWare automates business processes and workflows by electronically managing and sharing documents. Documents are readily available, where and when needed; one search quickly locates related documents.

# The processes

## Internal 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 of DocuWare



With an electronic sales folder you can group together all kinds of information, which can be specially stored or sent by email. 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 adhere to the set-up criteria of a folder are added to the archive, their links will appear. No need to keep looking for information - all the latest and greatest will find its way to you.

### Generating proposals

An inquiry for a proposal needs prompt attention. 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 authorising 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 of 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 of DocuWare



With DocuWare, you can supply your office employees, field workers, sales partners, and current and potential clients 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!



# Electronic customer folder

## 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 the 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 - a click away

Good preparation for an upcoming sales meeting is the first step to getting the order. DocuWare provides all your research requirements 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. From your email program, DocuWare automatically incorporates all incoming and outgoing email. 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, makes DocuWare the streamlining specialist.



|   | 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           |

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



# Real world

## Seeberger

This specialist in dried fruits and nuts has over 70 employees who handle Seeberger's administration, sales, accounting and purchasing - all with the help of DocuWare. Split-second access to the central document pool provides the basis for optimal communications and customer service. For sales employees working out in the field, easy access to data via the Internet has become an especially valuable tool.

Customer information had previously been stored in a variety of separate folders at Seeberger. Invoices, packing slips, order confirmations, letters - paper was taking over their offices.

But it wasn't just to win back more office space. No, it was the need to reduce search times and increase response rates to customer queries, as well as reduce time wasted on telesales preparation that prompted the company's investment in a Document Management System.

Today, the sales team has more time for core, strategic tasks. All information relating to a particular process can always be found - quickly and in its up-to-date state - even while on the road. Retrieval time and queries to other departments have virtually been eliminated. Even while on site with a customer, salespeople can access critical information and answer any questions before having to journey back to headquarters.

With the help of DocuWare, Seeberger has built on its reputation as a professional, quick-to-respond sales partner.

**Challenge:** To give department heads and sales personnel out in the field access to a central archive; link to existing Workflow application; integrate a variety of programs.

**Solution:** DocuWare, COLD/READ, ACTIVE IMPORT, INTERNET-SERVER

**Benefits:** Complete overview of customer data; faster response to customer inquiries; access to current information, even while on the road; and better customer service.

“We are completely satisfied with our new system. Administering the DocuWare solution requires very little effort. It has also meant getting back office space and shortening our paths to obtain information. And, most importantly, the services we can now offer to our customers have improved significantly.”

”

Wolfgang Wagner,  
IT Director





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 [www.nashua.co.za](http://www.nashua.co.za)  
 [solutions@nashua.co.za](mailto:solutions@nashua.co.za)

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