



Client Success Story

**PlanetPro's Quote Creation Program
Gives Sales Reps 16% More Time to Sell**

The Client

A hi-tech industry leader and a Fortune 100 company that provides hardware, software and services to customers worldwide. Also provides flexible and convenient support contract options for its products.

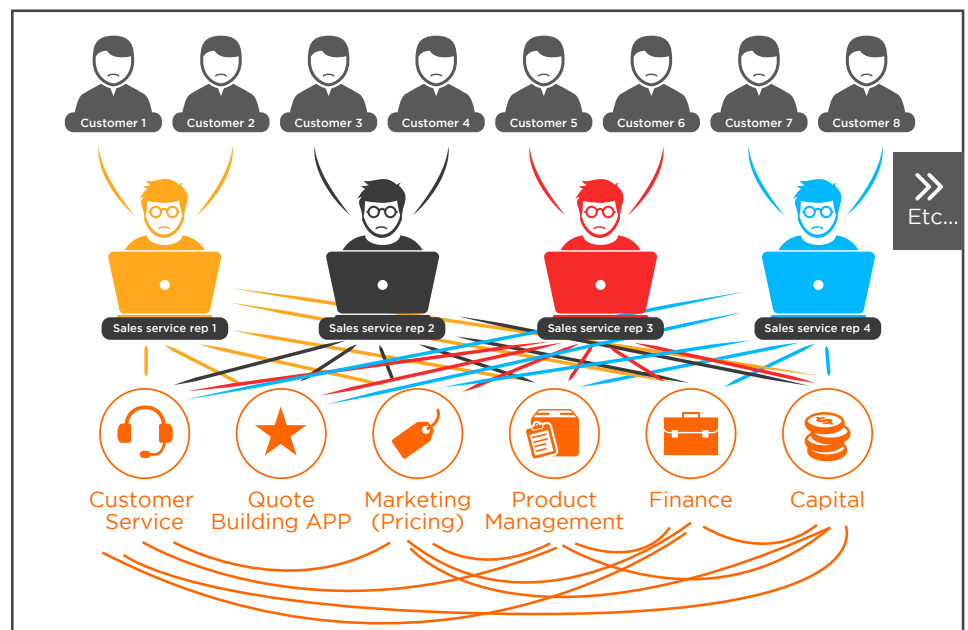
The Problem

Services sales reps in Canada faced a complex and time-consuming task to develop quotes for service and support contracts. When contracts came up for renewal, reps would have to work through multiple steps, taking anywhere from a few days to a month to complete.

This caused several Issues:

- » Lost selling time: total of two weeks out of thirteen every quarter and roughly 15% of the team's time.
- » Lost/delayed revenue from poor visibility into support contract information.
- » Lost productivity from duplication errors and process complexity.
- » End customer dissatisfaction due to the long turn-around time in providing quotes.

BEFORE: Quote building process involves complicated, time-consuming communications between sales reps and various internal departments.



Some of the many steps in developing support contract quotes:

- » Sales reps analyzed existing equipment and service agreements.
 - » Customers verified the equipment they needed.
 - » Sales reps identified which items were still serviceable versus those that needed to be replaced.
 - » Sales reps recommended equipment upgrades and service requirements.
 - » Sales reps calculated quotes for existing service levels and other service options.
 - » Sales reps informed the client's customer service department of any product configuration changes.
 - » Finance provided billing IDs and account information for each individual order.
 - » Customers reviewed and then approved the quote as presented to them or requesting revisions, sometimes requiring multiple iterations.
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The PlanetPro Solution

Phase I: Giving Back Time

To manage the quote creation process, PlanetPro deployed a team of Deal Support Specialists (DSS). Within two months, sales reps on the team had gained two weeks of time back per quarter per sales rep.

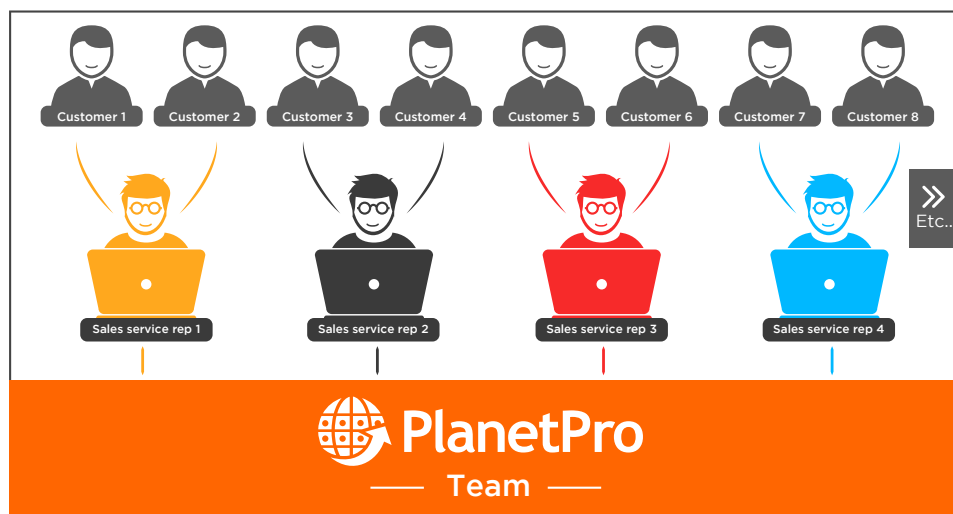
Phase II: Process Improvement

After seeing the first phase's success, the client engaged PlanetPro to manage the complete quote building process. This gave client sales reps even more time to focus on core revenue generating activities.

While managing the process, PlanetPro identified several inefficiencies:

- » Sales reps were submitting requests for quotes to the PlanetPro team through multiple channels e.g. phone, email, and instant messaging.
- » Sales reps sometimes accidentally initiated two identical requests with two different PlanetPro analysts. This resulted in multiple requests entering the system.
- » Duplicate requests were slowing down other departments involved in creating contracts, such as customer service, finance, and pricing.
- » Sales reps sometimes left out critical pieces of information, leading to further delays.

AFTER: PlanetPro provides a simple black box solution to simplify and manage quote building process.



Based on these observations, PlanetPro found ways to simplify the quote building process. This included establishing one channel for sales reps to submit requests and assigning them one primary DSS analyst.

PlanetPro also looked proactively for ways to help the client realize incremental sales opportunities. For example, PlanetPro used the client's CRM tools to track and identify sales activity across all customer accounts. This allowed sales reps to, for example, iden-

tify when contracts were due for renewal. Being on the ball at renewal times meant they could take prompt action, maximize sales opportunities, and avoid the risk of delaying or losing support contracts.

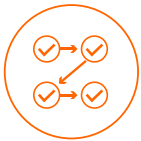
With increased visibility into accounts, sales reps felt better prepared to present clients with advantageous promotional deals when contracts were due for renewal, further increasing customer loyalty.

Client benefits

With PlanetPro's custom sales support program, our client accelerated their revenue growth.



16% more time to sell



Simplified process



Improved end customer satisfaction

Key benefits

» Increased revenue opportunities from sales reps having more time to sell (average of almost two weeks per sales rep per quarter).

» Increased revenue opportunities (upselling and higher rates of renewal) from better account visibility and pipeline analysis.

» Increased productivity/ decreased service costs from stan-

dardized, streamlined process that saves time for all the departments involved in the quote building process

» Increased ease of conducting business.

» Improved end customer satisfaction from more face time with sales reps and proactive account management.

Client feedback

"PlanetPro DSS analysts are rock stars! They are always there to help! Fantastic support of the business".

- **Director of Operations**

"PlanetPro team: Your efforts are resulting in productivity for our stakeholders and business efficiency. THANK YOU!!!"

- **Director of Sales Operations**

"Outstanding operational leadership in support of Canada's business. This is a mighty team that delivers fantastic results!"

- **Director, Sales Strategy & Planning**

Learn More

We're here and happy to chat about how our services can help you address your unique business needs. Get in touch with us at 925-277-0727 or hello@planetpro.com

PlanetPro is a Silicon Valley based firm that specializes in revenue acceleration services to grow your business.

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