Top 5 sales processes that are the culprits of busy work.

Automating your workflow
to make your work flow.

Spend your time following leads, not paperwork.

Selling services and products is paramount to any organization's success. But manually entering sales leads and contracts inevitably leaves teams with less time to close deals and service existing clients. Leads and customers end up moving along much faster than a salesperson's ability to get through all the paperwork. When sales teams adopt effective (automated) processes into their systems, they can complete tedious, paper-based tasks.

Get familiar with the top processes within sales to see how others have begun laying the groundwork for future success.

Opportunity management

Sales proposal

Discount approval

Contract management

Contract renewal

Opportunity management

Sales and management teams often drown in paperwork, becoming too busy to tend to their core business functions. From taking notes on paper to manually entering leads and duplicating data entries it's a wonder sales managers can respond to sales opportunities at all.

Missing leads—or failing to follow up on them—is a missed opportunity, and can cost a company revenue.

Solution

An opportunity management workflow that automates record entry, triggers alerts and follow-ups, and issues auto-generated documents to streamline busy work.

Capture notes and prospect data using Nintex Forms on any device

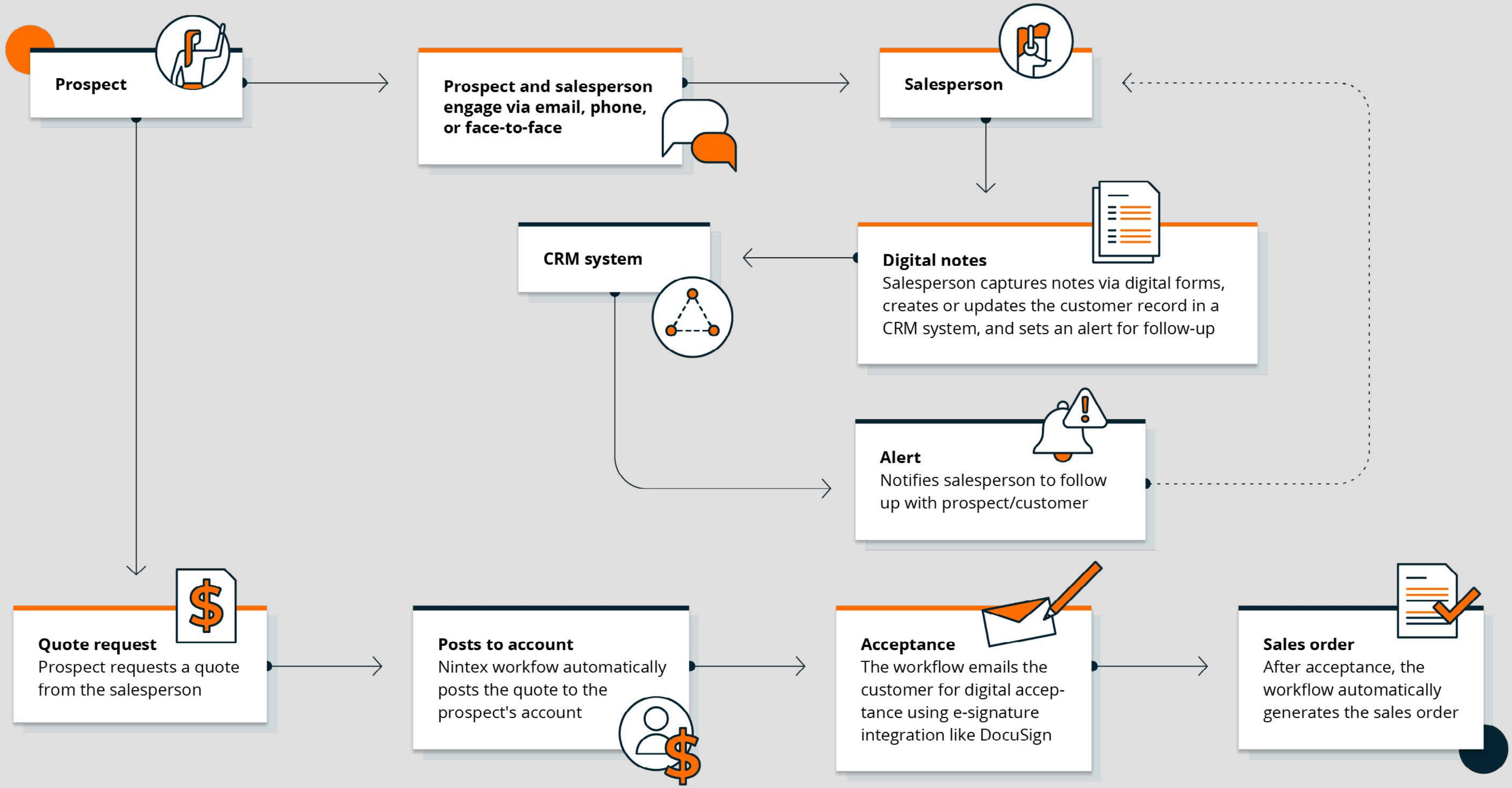
Automate record entry and conversion in CRM applications and set alerts for sales to follow up

Wake inactive lead data to re-engage prospects that have gone dark

Auto-generate custom documents directly into Word, Excel, and PDF files with data dynamically pulled from CRM systems and other sources

Use metadata to enable proper routing, allocation, and tracking of leads

Use Case: Opportunity management



Sales proposal

Quoting is a key part of the sales cycle. For many sales reps, preparing a sales quote can involve massive Excel spreadsheets, PDF product catalogs, and different product/pricing databases. Simple errors, incorrect pricing, incompatible line items, mismatched terms and conditions, and other serious problems can result from inefficient or manual quoting practices.

Spend more time closing business deals, than writing contracts for them.

Solution

Utilize digital workflows to simplify collaboration and effectively manage sales proposals through their lifecycle.

Auto-generate branded sales proposals that include all of the required documentation, legal terms and conditions, product information, and cover letters

Regulate access of sales quotes to and from CRM systems, cloud data repositories, and Electronic Document Management (EDM) systems

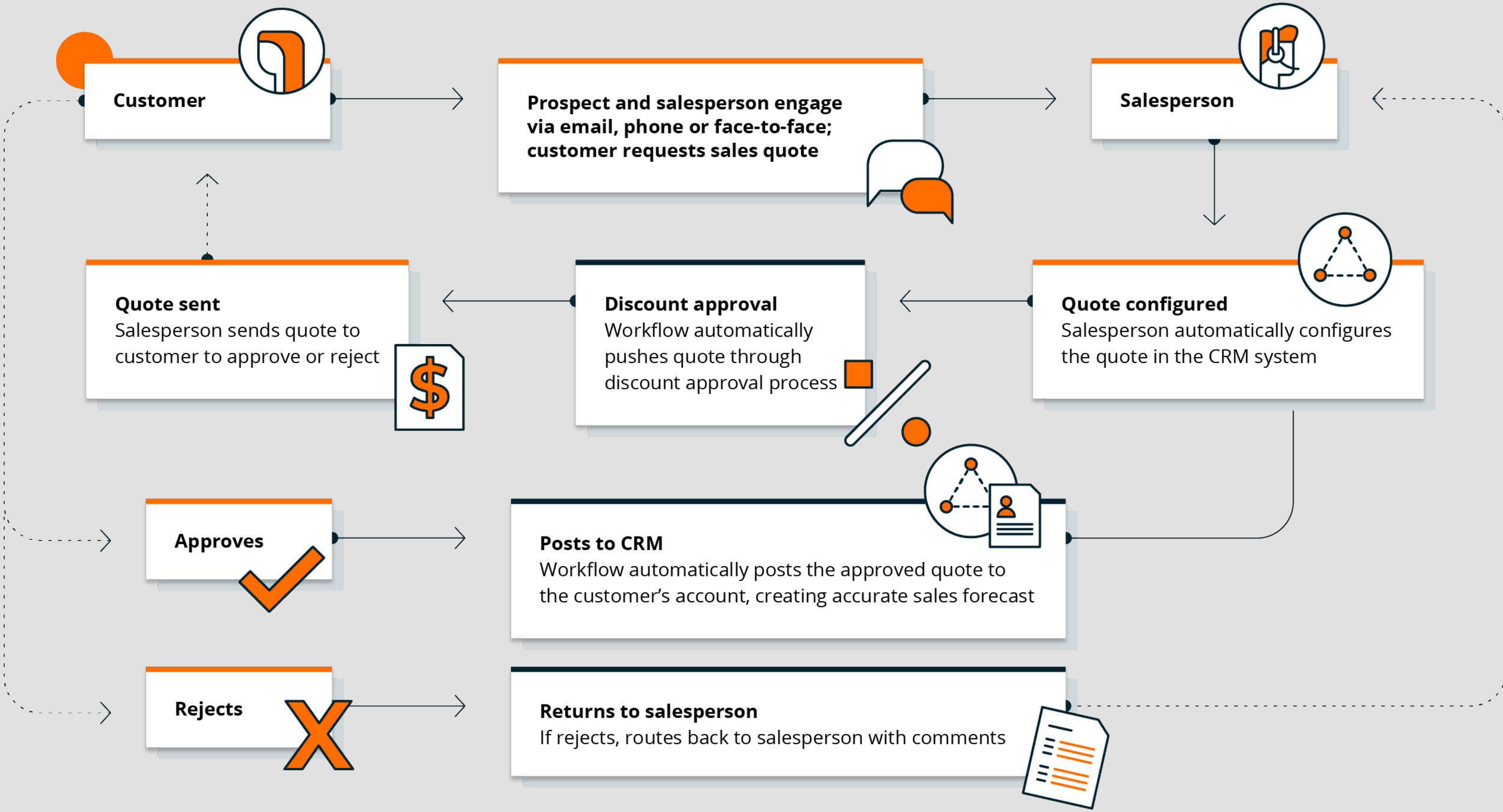
Set reminders to expedite reviews and approvals

Ensure that your sales reps have the right pricing information, and use automated workflows to manage and control discounts

Keep a secure audit trail of all revisions

Use workflow analytics to get insights across the CPQ (configure, price, quote) process

Use Case: Sales proposal



Discount approvals

Agreeing on a price can make or break a sale. But inconsistent manual sales discount approval processes often result in lost time, opportunities, and productivity. Reviewers and sales executives end up missing approval request deadlines, mistagging Salesforce opportunity records, and having far too many false starts. Sound familiar?

Eliminate bottlenecks that are keeping you from the finish line.

Solution

A process that automatically starts when a discount limit is set, notifies multi-level approvers, and integrates with your CRM system—all with a single click.

Automatically trigger approval workflows when an opportunity record in the CRM system is updated with a discount

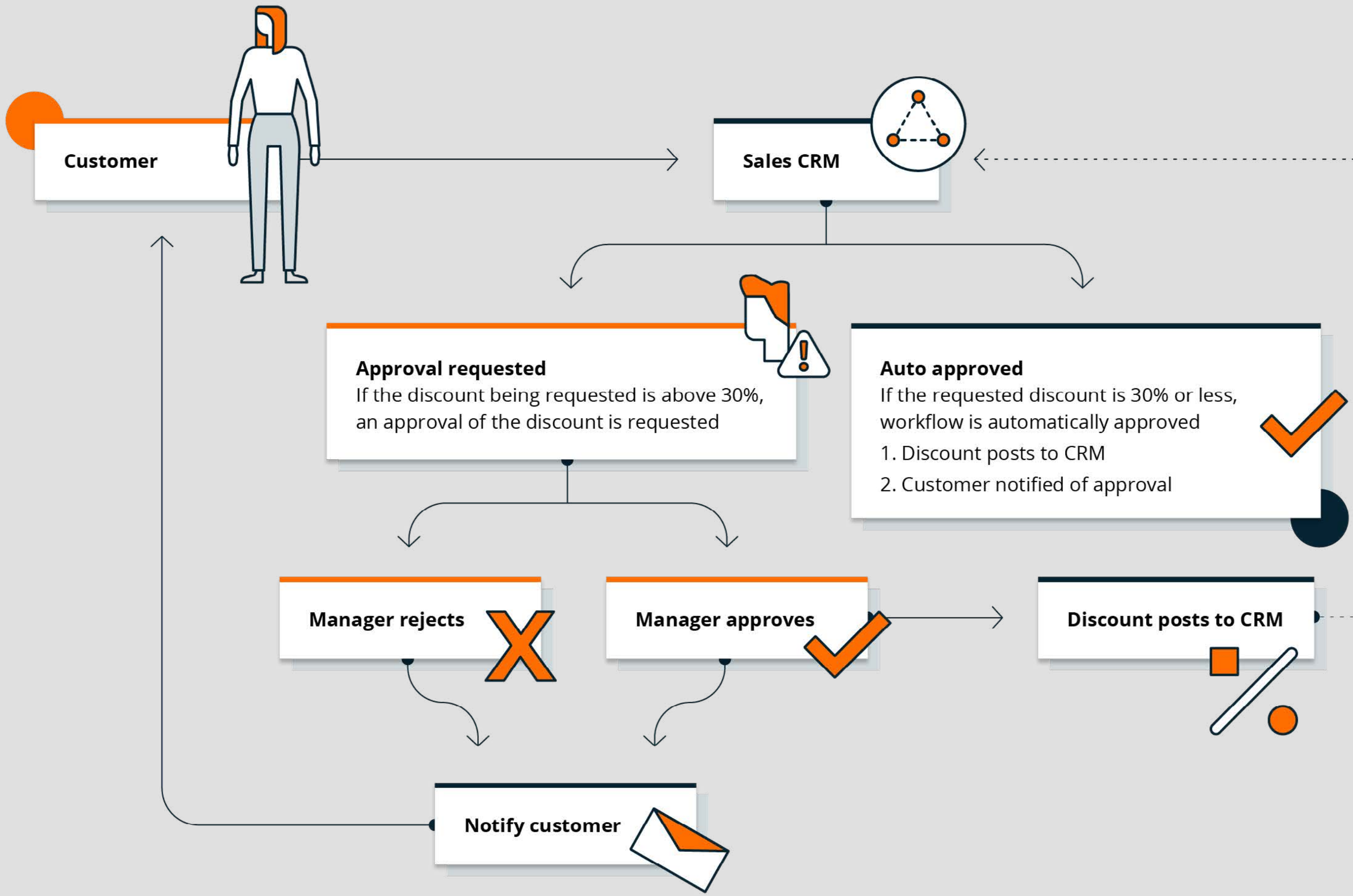
Set approval limits by authorized user

Set alerts to make sure reviewers and sales managers don't miss approval requests

Keep an audit trail of discounts

Use workflow analytics to identify bottlenecks in the approval process

Use Case: Discount approvals

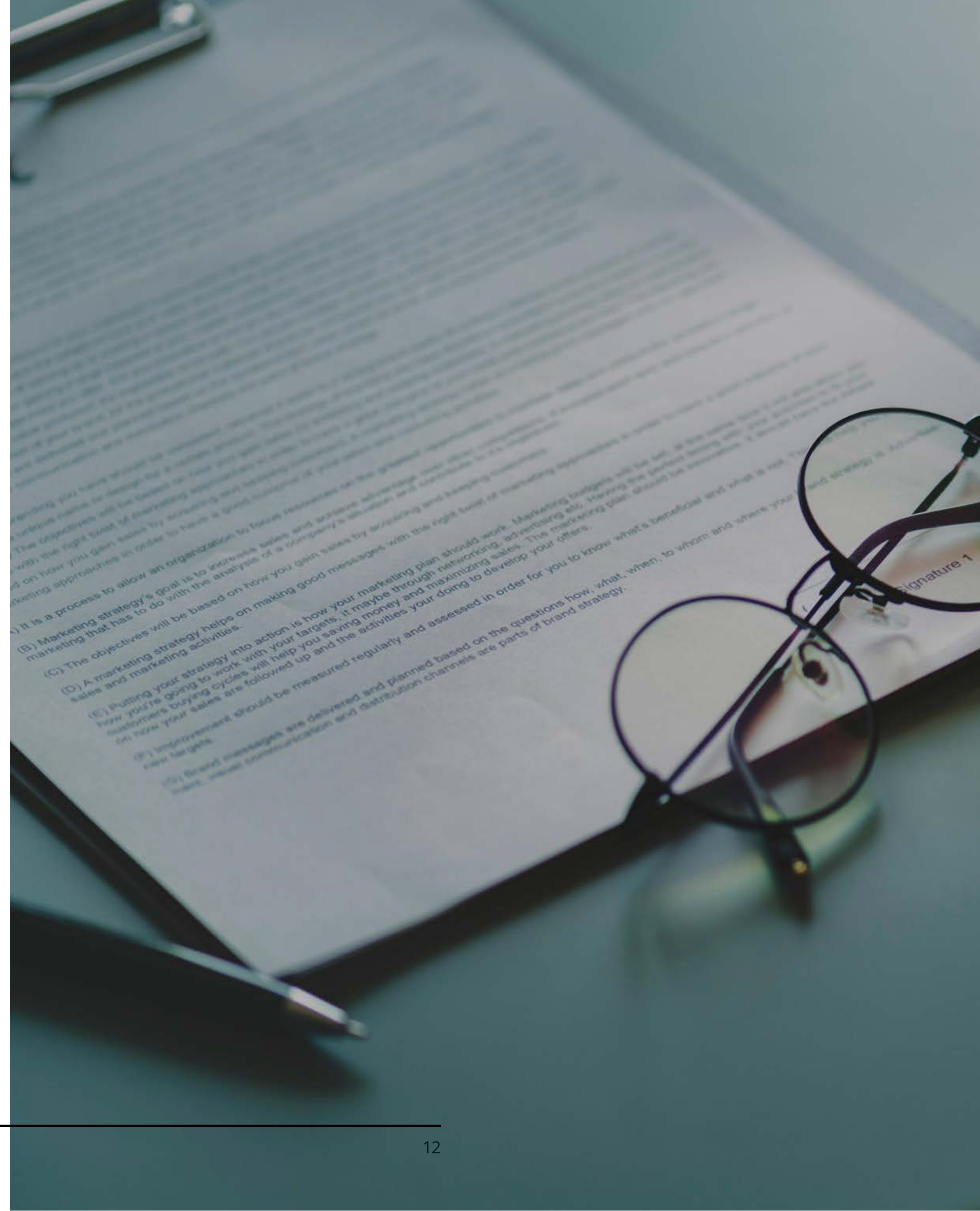


Contract management

Contract management could be one of the most important jobs in the world of sales. It's also the most stressful. When so much is on the line, improper processes can lead to poor policy compliance, inaccurate information, and delayed sales cycles. It doesn't—and shouldn't—be so difficult.

The average revenue loss due to poor contract lifecycle management is 9.2%.*

*Source: Aberdeen Group. "The Contract Management Benchmark Report: Optimizing Supplier Relationships." IACCM (International Association for Contract & Commercial Management). July 2003



Solution

A workflow capable of triggering notifications at milestone moments, issuance of standardized contract documents—all with e-signature integration.

Auto-generate contracts in Word, PDF, or Excel file formats, eliminating lost paperwork and version confusion

Route sales agreements to appropriate stakeholders for review

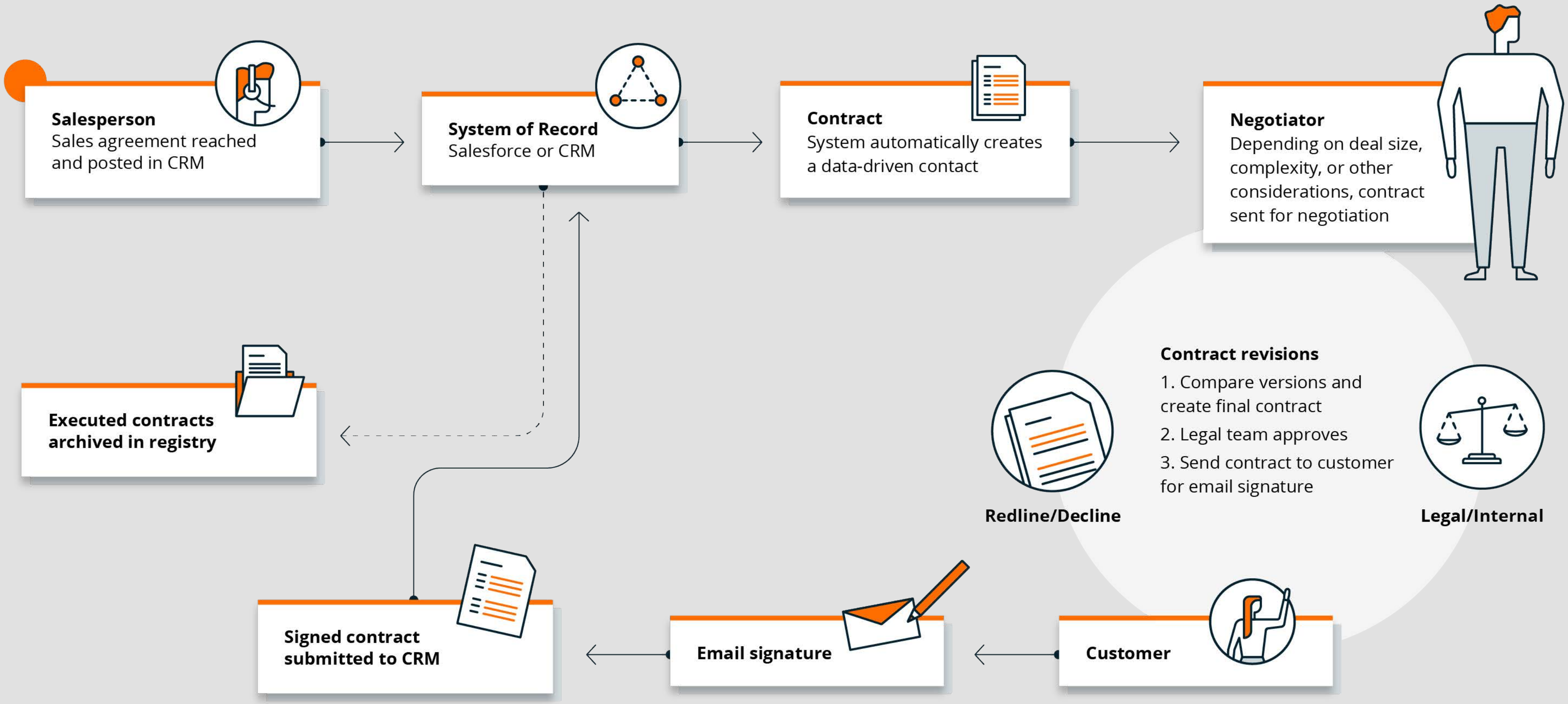
Eliminate delays in approvals and lost contracts

Create secure access to contracts

Access and publish documents to and from line-of-business applications

Execute contracts through popular digital signature providers, integrated directly into your workflow

Use Case: Contract management



Contract renewals

For sales of any kind, customer retention is critical. So with renewals taking place at all times (in a variety of CRMs), simple errors like incorrect pricing, incompatible line items, mismatched terms and conditions, and failed notifications can result from excessively manual practices.

Free up time up, so account reps can focus their efforts on closing renewals, not just building them.

Solution

Connect multiple CRMs, and set actions that can generate contract renewals and other transactional content, automatically.

Handle renewal cycles in near-real time without intervention

Retrieve relevant details from past contracts and calculate projections for the coming year

Auto-generate renewal contracts that include all of the required documentation, legal, product information, and cover letters

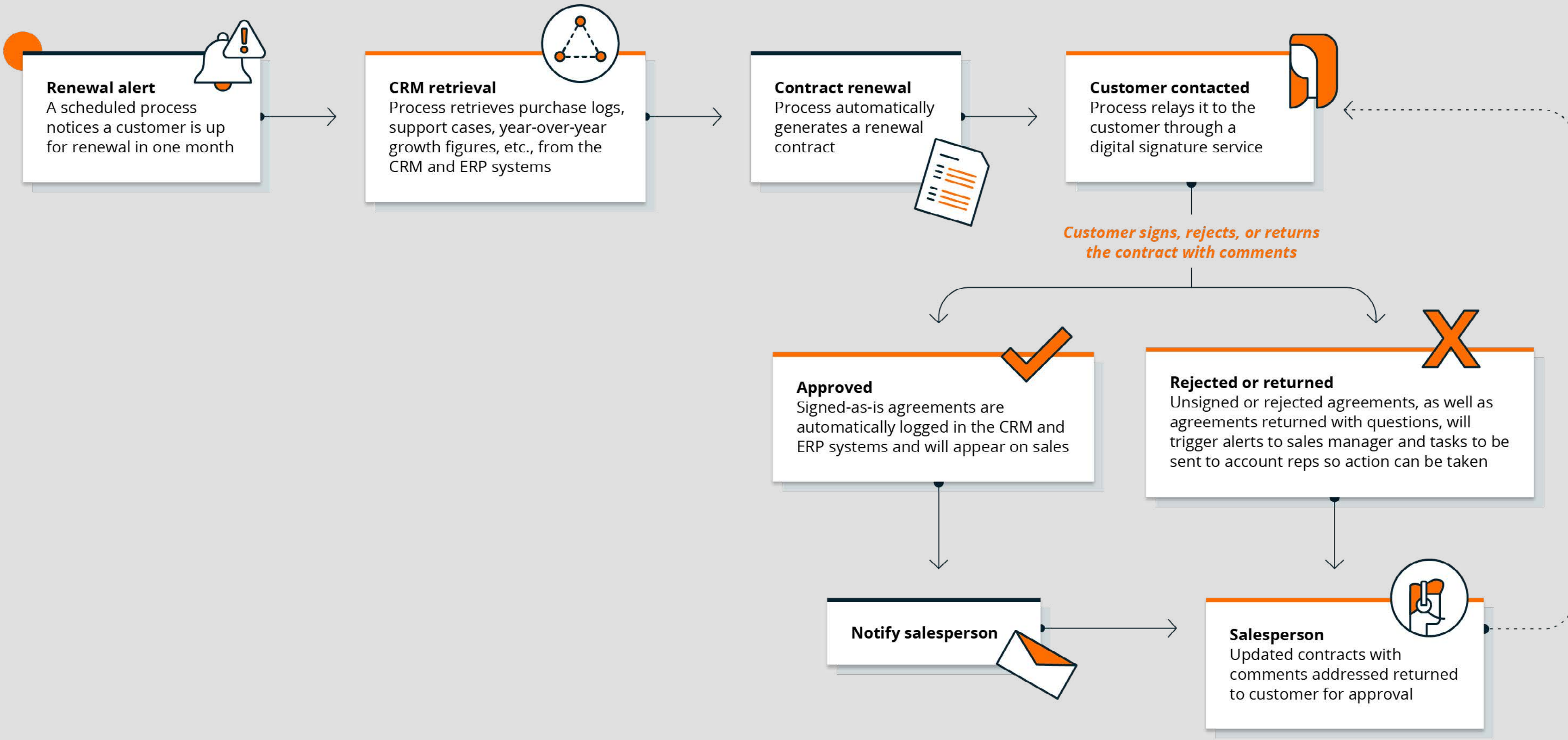
Log documents and interactions with CRM systems, cloud data repositories, and EDM systems

Notify managers when exceptions to pre-de ined rules occur

Keep a secure audit trail of all work

Use work low analytics to get insights across the process

Use Case: Contract renewals



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