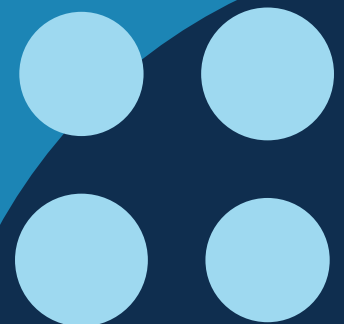
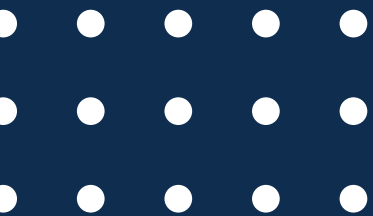




Taking Your Next Steps with Document Automation or CPQ



If you're in a competitive, fast-moving, midsize company selling complex products or services, you know the critical importance of delivering an exceptional customer experience every time.

You also know that this reality makes your business heavily dependent on integrated technologies — technologies that are mission-critical and highly visible to your customers and that often affect the lives of thousands of people every day.

That's why you're also aware of the huge competitive value of systems and processes that can deliver continuous improvement and achieve accelerated creation of value by shifting away from repetitive manual and cognitively demanding work.

You've seen the value of moving toward more and better automation, of focusing on automating your sales and other processes that are less suited to people and more suited to technology.

Specifically, you know that if configure, price, and quote (CPQ) solutions and document automation software would work the way their vendors say they would, they'd be delivering what you truly value:

- 01.** Seamless integration among critical work systems
- 02.** An exceptional customer experience
- 03.** The latitude and freedom to operate and configure solutions or deliver documentation for a customer within the necessary constraints



Unfortunately, you've probably also experienced the limitations of so many CPQ and document automation solutions today.

Whether you're an executive-level decision maker or a decision influencer and stakeholder in IT, sales, operations, or product or process development, you have the knowledge and experience in these areas to know you're still seeing too much inefficiency, too many inaccuracies, and too much administrative and similar types of work being done manually — all failing to add value to the business.

**SO, WHAT CAN YOU DO? WHERE DO YOU LOOK?
WHAT'S YOUR NEXT BEST STEP?**

This ebook helps answer those questions, so you can find a CPQ or document automation partner that will work with you to bolster your capabilities, expand your expertise, and achieve what you value for your organization.



The Need for Scalability

To stay competitive, regardless of current market trends or economic forecasts, your organization needs tools that will support high-speed growth no matter what the future brings. That's what scalability is all about, in a nutshell.

As a blog post on the [Enterprise Podcast Network](#) summarized it:

“When your business starts to grow — no matter the industry — there are going to be unique issues concerning your company’s ability to function well with expansion. Scalability is a large part of growing a business, as it determines your company’s ability to remain efficient despite all of the changes.”

Business.com put the same thinking in language your leadership and C-suite will relate to:

“A scalable business model serves as an engine of growth for your company and positions it well to handle that growth with the proper systems in place.” Think how companies like Zoom suddenly took off during the COVID-19 pandemic.

SCALABILITY AND CPQ

Those may be extreme examples, but in everyday business, industries that rely on CPQ technology need to be equally poised for growth. Consider this [assessment from iBASEt](#), a provider of digital strategies for companies that build and maintain complex products:

“Modern manufacturers are under increasing pressure from an unpredictable marketplace. They are processing huge amounts of data, especially in complex and highly regulated industries like ... healthcare. All of this calls for a business designed for efficient implementation of business processes, and a structure that enables high-speed scalability.”

SCALABILITY AND DOCUMENT AUTOMATION

The same is very much true in industries that rely on document automation, such as insurance, healthcare, and financial services. The need is especially acute in industries that have seen significant change in the last few years.

In its [Top Insurance Industry Issues 2021](#), PWC said, “More change has occurred in the industry in the past year than in the previous several years combined, and its pace is only accelerating.” But change has created a tough combination of competing realities for insurance companies.

- On the one hand, according to [Digital Insurance](#), these changes make it necessary for insurance agencies to scale, add new risk products, and provide a modern, digital-first customer experience,”
- At the same time, the publication notes that, “the digitalization of the insurance distribution cycle has strained legacy systems. Many of these systems are decades old and never truly delivered on their promises in the first place.”

The upshot is that automation, including document automation, is well-positioned to facilitate digital transformation without jeopardizing customer service.



CASE IN POINT

Automated Workflows Enable Rapid, Accurate Generation of Highly Variable Contracts

For ABC Financial, success brought challenges. The software solutions company supports operations for 6,700 health clubs and gyms in the United States, Puerto Rico, Canada, Mexico, and Europe, and it was experiencing fast and rapid growth that [brought undeniable challenges](#):

- 01.** Preparing the increased number of contracts and onboarding all of the new customers had become inefficient and time-consuming; static onboarding forms were becoming obsolete before they could be used.
- 02.** Contracts that had 150–200 different, variable data fields, all filled in by hand — and with the same data being entered a second time, into ABC Financial’s Microsoft Dynamics CRM system.
- 03.** Many of ABC Financial’s customers operated multiple facilities, so location-specific contract data and language had to be manually inserted for every new deal.

The Solutions: End-to-end Automation, Extended Functionality

- Experlogix rationalized the templates in ABC Financial’s document library from 20 down to three. Revisions could be made and released in a fraction of the time previously required. Sales representatives always had the most current, compliant versions of every document.
- Experlogix’s seamless integration with Microsoft Dynamics CRM solved the cumbersome, error-prone, and time-consuming practice of entering data twice; salespeople could spend more time on more productive tasks — like sales calls.
- Experlogix Document Automation could trigger additional processes based on business rules for individual situations, including gathering and storing secure electronic signatures via integration with AssureSign.
- ABC Financial wanted to automate follow-up actions that would be triggered when data is collected from new customers. Experlogix rapidly extended the functionality of Experlogix Document Automation within a matter of weeks.

“Generating a single contract used to take us over an hour. It is now a 10-second task. It sounds like a cliché, but all we have to do is literally click a button.” — Kyle Childers, Director of Technical Sales, ABC Financial

The Need for a Truly Low-maintenance Platform

Scalability is important. But it's not going to be as successful as it could be without a low-maintenance technology platform that:

- 01.** Delivers a **clean, fast, accurate, and user-friendly self-service experience** for your partner and customer ecosystem, or
- 02.** Otherwise helps your front-line, customer-facing sales and service-delivery employees **quickly respond to customer needs** and your business opportunities, or
- 03. Accomplish both of those goals**

LOW-MAINTENANCE AND CPQ

For companies that rely on CPQ to manufacture and sell complex products or processes, technology that isn't low-maintenance won't be able to deliver great customer and employee experiences. And these are the new definitions for business success. Instead, your CPQ software will likely end up wasting everyone's time and your money, and it will inhibit your company's growth. For example, if you need to continually reset parameters and rules manually, your system may configure combinations that your manufacturing team can't build.

Similarly, a CPQ platform that demands constant updating and system maintenance will limit your flexibility to handle non-standard requirements and won't be able to seamlessly and accurately guide customers — or your sales team — through configuration and pricing.

The bottom line is that CPQ is one thing. But it's something else altogether to have CPQ software that's built to easily and accurately meet your changing and growing needs, on the fly, whenever it's needed. This substantially boosts your competitive advantage.

LOW-MAINTENANCE AND DOCUMENT AUTOMATION

The employee and customer experiences are perhaps even more critical for companies that depend on document automation. It's not just a matter of having the technology to produce accurate documents quickly. It's a matter of having document automation technology that you can easily and efficiently apply to every process, with customers, partners, or employees.

A low-maintenance document automation platform ensures you create great customer interactions and meaningful connections regardless of the parameters or the situation.

However you're applying document automation today, imagine the power you'd have to increase productivity and grow your business if you could easily configure your document automation software to:

- Create more-complex document templates
- Capture customer information and data
- Store and manage enterprise content
- Electronically sign documents
- Generate documents interactively, in batches or through automated flows



CASE IN POINT

Document Automation Streamlines Insurance Company's Processes Previously Done Manually and in Dynamics 365

Quebec-based SSQ Insurance had reached \$11 billion in managed assets when it sought to [change how it created customer-facing documents](#) such as contracts and letters.

Despite its size, SSQ was managing these critical customer communications with manual systems — Microsoft Excel worksheets and Access databases. SSQ needed to update its document generation process to improve operational efficiencies, enhance compliance, accelerate communications, and ultimately drive even greater customer loyalty.

The Solutions: Ready to Go Right Out-of-the-Box, Extended Functionality

- Experlogix Document Automation enabled SSQ to begin driving its document generation directly through Microsoft Dynamics 365, the insurer's CRM. The new system's built-in, robust connections for Dynamics 365, user-friendly interface, and powerful capabilities for template creation, management, and delivery immediately simplified and streamlined the creation and delivery of documents.
- The only necessary customization was to build a connection between Xpertdoc and SSQ's document archival system.
- After training on template creation, SSQ employees operated the system nearly autonomously, creating over 3,000 documents without any errors or issues in the first three months.
- Unlike the system that ran on Access, the new automated system had no limits on the number of concurrent users, eliminating unexpected crashes, lost productivity, and errors.

“We pleased our users. Now they create customized, variable data documents on demand with one click.” — Nicolas Rame, Analyst at SSQ Insurance

The Need to Create Defining Moments

Automated CPQ and document automation can do a lot more for your business than make your processes run more smoothly and accurately. They can empower your sales and other customer-facing employees to:

- 01. Be more proactive** with customers
- 02. Create defining moments in the sales process** for customers, partners, and even for your employees

Every customer journey is a series of experiences — from considering your brand, to buying your product or service, to getting customer service, and beyond. Along the way, your customers, partners — even your employees — experience situations and interactions that have a significantly greater impact on them and on their relationship with your company. These are the moments they remember, for better or worse. These are defining moments.

Meanwhile, in every industry and especially those that involve selling complex products or processes, the customer journey is becoming less a series of face-to-face interactions and more a series of online or digital interactions. This is where the power of optimal automated CPQ and document automation can make a significant difference in your business.



DEFINING MOMENTS AND CPQ

Think about your organization's buyer's journey, from their first interaction with your brand through the final delivery of your product or service. Consider how many touch points there are. That's the number of opportunities your salespeople have to deliver truly great customer service and create moments that will resonate with your buyer to turn them into brand advocates.

Odds are good that any one of those moments are intricately tied to the often complex process of:

- Configuring (and usually reconfiguring and redefining) the details of the product or service, sometimes configuring details of the same product or service in different ways to meet the rules and regulations of different states or other jurisdictions where they will be used
- Automatically updating the pricing of those various configurations and reconfigurations, and doing it accurately and quickly
- Delivering accurate, compelling final quotes to your customers, with detailed estimates based on the configurations and pricing they've already agreed to

The right CPQ system will make sure you deliver defining moments of great customer service at each step. For example, by making it incredibly easy to select, visualize, and specify options, or to receive customized, accurate, and compelling quotes faster than the competition can deliver them.



DEFINING MOMENTS AND DOCUMENT AUTOMATION

Just like companies that rely on CPQ technology, businesses that rely on document automation have a wealth of opportunities to use that software to do more than improve workflows and processes. From insurance to healthcare to real estate, from sales to legal to HR, document automation is essentially a chain of interactions with your customers, partners, and employees.

Which means your document automation technology and processes offer myriad chances to increase customer satisfaction and create defining moments that enhance your brand and create customer advocates.

For example, customers can be wowed by document automation that delivers them:

- 01. Faster response and turnaround times**, for everything from sales quotes to customer support
- 02. Greater cost savings**, thanks to having a more efficient business process working with you, which in turn can drive improved productivity and performance for them (with the same being true inside your organization, improving employee productivity and performance)
- 03. Increased accuracy**, which makes the lives of your customers (and employees) easier and helps their business (and yours) run more smoothly and productively
- 04. More efficient teamwork** for customers, partners, and your employees, thanks to fast, accurate document creation and dissemination, and centralized document management
- 05. Greater confidence in document security**, compared with having paper documents floating around and stored in multiple systems



CASE IN POINT

Document Automation Boosts Sales, Cuts Enrollment Costs for Employee Benefit Plan Administrator

[GroupHEALTH Benefit Solutions](#) is a Canadian employee benefit plan administrator that, despite 40 years of business and supporting 450,000 employees and their families, was still using a paper-based enrollment process and relying on manual data entry. The outdated method was fraught with errors at every step, making it difficult if not impossible to consistently capture accurate data. The customer experience suffered and GroupHEALTH was not maximizing its sales potential.

The company knew it could improve enrollee experiences, save money, and boost coverage by implementing automated documentation and digital intelligence.

The Solutions: Smart Forms and Optional Coverage Sales

- Xpertdoc's Smart Form technology created a digital enrollment process for GroupHEALTH. Employees receive an email invitation with a link to relevant online enrollment forms, and the system leads each enrollee through online benefits selection.
- The solution reduced errors by making information clear and accurate for each enrollee's situation. It automatically prompts enrollees to supply missing information and points out inconsistencies they need to correct in real time.
- Xpertdoc supported GroupHEALTH to boost sales of optional coverage. The old system required enrollees to complete additional paperwork to purchase optional products — with much of the required data the same information they'd already entered on the regular benefit enrollment forms. The Smart Form online enrollment solution computes the cost of the products based on previously acquired data and asks employees if they want to buy coverage through payroll deduction. Not additional data is needed.
- Within the first open enrollment season, GroupHEALTH saw a 5,000% increase in sales of optional coverage, a 25% reduction in the cost of managing enrollments, and a measurably improved customer experience.

“Difficulty reading handwritten forms, like misspelling a member's name, can impact the enrollees months later. A member might be denied drug coverage by a pharmacy if their name doesn't match the insurance records. That causes unnecessary stress and creates negative customer impressions.” — Jim Moore, Chief Operating Officer, GroupHEALTH

Are You Ready to Take the Next Step?

Your CPQ or document automation technology could take you in any number of directions, from improving your own workflows and processes to doing the same for your customers and partners.

Most importantly, you likely have specialized institutional knowledge and internal practices that the right CPQ and document automation technology can enhance and put to their most advantageous use.

To cut to the chase, you're the kind of leader who needs and wants to bolster your capabilities and expand your expertise.

With a vendor who works collaboratively with you and is actually a partner in transforming your business processes and workflows, you have the opportunity to move beyond the more-or-less standard expectations of a CPQ or document automation solution.

- 01.** The right partner will help you identify what in your existing processes need to be preserved and what needs to be enhanced, to ensure your technology positions you for growth no matter what uncertainty, twists, and turns the future brings.
- 02.** They will deliver technology that you don't need to continually retool or manually reconfigure as your needs and business change.
- 03.** Finally, they'll work beside you to help you identify and enhance the most important interactions with customers, partners, and employees, to make them supporters of your brand.

Experlogix CPQ and Experlogix Document Automation will meet you right where you are to identify the gaps in your workflows and processes that are both visible and hidden, to move your technology forward to be ready for whatever comes next, with assured ease of use and the ability to drive greater brand affinity.

[Contact Experlogix today.](#)



Contact us today to
learn more about how
Experlogix can help!

[Experlogix.com](https://www.experlogix.com)