

Case Study

Company: Vodafone

Region: UK and Europe

Industry: Telecommunications



Vodafone Global Enterprise cut sales bidding process from 20 hours to One Minute

Vodafone Global Enterprise partners with *Relate Technologies* to implement Knowledge Centre and Automatic Bid Creation (ABC) System



SUMMARY

Vodafone Global Enterprise (GE) is a division of Vodafone providing corporate solutions to the group's top 500+ multinational companies.

In order to acquire and provide additional services to their client base, Vodafone GE needs to generate detailed proposals and service agreements outlining product and service descriptions, client specific pricing and customised terms and conditions.

SITUATION

The development of sales proposals to Vodafone GE clients and prospects was taking up to 20 hours on average and involving up to eight people as:

- content needed to be sourced from different systems,
- pricing needed to be verified on a case by case basis,
- the latest product or service specific terms and conditions needed to be identified, and all content needed to be pasted into a common template to ensure branding guidelines were adhered to and a professional impression was made with every proposal received from Vodafone GE.

In addition, as new content was being produced or updated, proposals were prone to human error, such as inaccurate data or simple grammatical mistakes and spelling errors. Compounding the problem was the generation of new content on the fly, which was being added to the mix without any proper version control.

SOLUTION

Vodafone GE launched a project to implement a Knowledge Centre and Automatic Bid Creation (ABC) System to centralise all sales content and cut operating and maintenance costs by replacing the disparate array of stand-alone and manual solutions with a Microsoft SharePoint based solution. To support it in this project, Vodafone GE turned to Relate Technologies, a South African Microsoft SharePoint Centre of Excellence.

In addition to providing SharePoint implementation and development services, Relate Technologies partners with SharePoint value-add vendors to extend SharePoint functionality. Relate Technologies' vendor partnerships with **Nintex** and **Qorus** meant it could add workflow and document generation functionality to Vodafone GE's SharePoint installation, which would help to dramatically decrease the time and costs required to respond to bids and generate proposals.

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Relate Technologies set up Vodafone GE's SharePoint environment to support the objectives to centralise all sales related content and to interface with their CRM system, Salesforce.com. The integration of SharePoint with **Salesforce.com** meant that the chosen document generation utility, **Qorus**, would be able to automatically pull client specific information, such as client preferences, account and contact details, and automatically customise the proposal accordingly. The **Qorus** document generation utility enables content authors to create **Microsoft Word** templates that include auto tags and business rules, which specify the location and nature of content to be automatically incorporated into a sales proposal.

Nintex Workflow was then incorporated into the SharePoint solution to automatically route proposals through an approval process.

Finally, external access to the Knowledge Centre also enables agencies and clients themselves to collaborate on the bid generation process.

SITUATION

Time Saved

Vodafone GE's sales team no longer spends time

- searching across the organisation for the latest version of content
- verifying the accuracy of information
- ensuring proposals are sent to the right people for verification and approval
- ensuring proposals comply with regulations and requirements

Increased Sales

Proposals are now more professional as they

- contain fewer (if any) errors
- are consistent in layout and font
- contain all requested content

Cost Savings

- The Knowledge Centre has reduced operation and maintenance costs by consolidating existing systems onto SharePoint
- A task that used to require the involvement of 8 people on average now requires only one person to complete



THE BOTTOM LINE

"The time it takes to create new proposals has been reduced dramatically from up to 20 hours to now literally about one minute. As a result, Vodafone GE's client base has increased from 270 to 586 in less than a year as sales people can now spend less time generating proposals and more time selling solutions and managing clients."



"The reduction in time and man power required to generate proposals has resulted in an annual cost savings of EUR 403 000."

Jonathan Dawson,
Knowledge Manager, Vodafone GE.

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