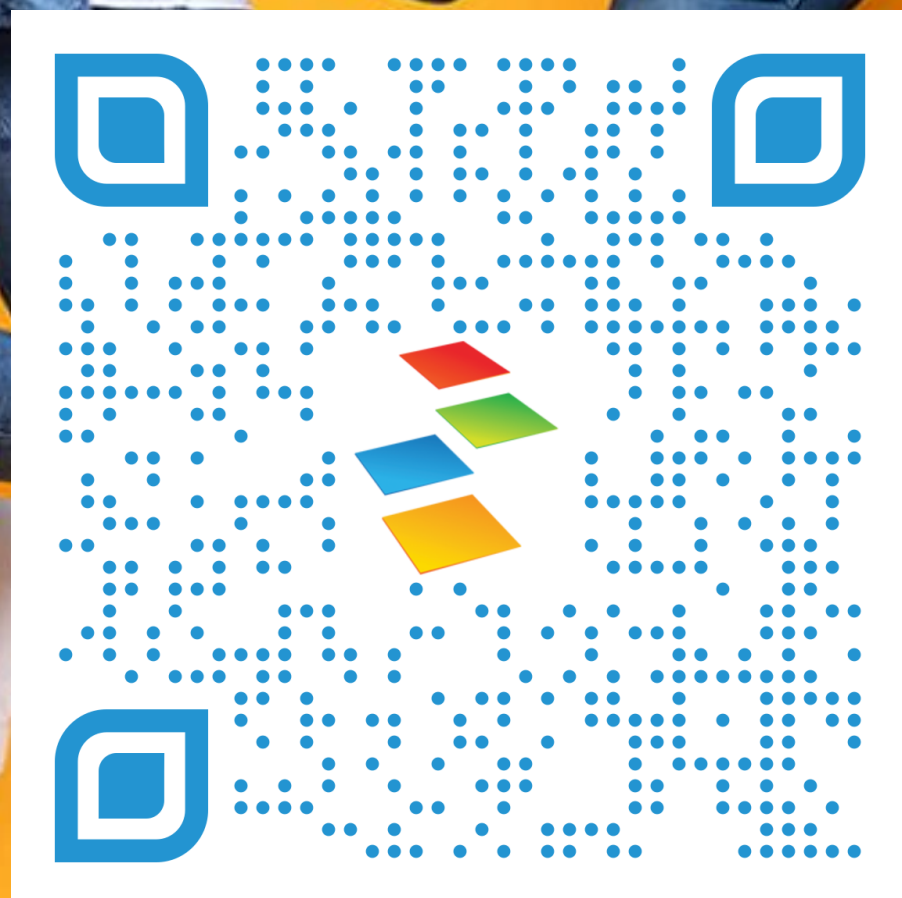




Empower Sales with Technology for Enhanced Customer Experiences





Housekeeping

- Please silence your phones. If you need to take a call, feel free to step outside and come back in.
- Sessions are being recorded and will be available after.
- Please use this QR code to take the session survey before heading to the next session.
- Survey responses get you more entries into the raffle at the end of the day. (prizes included surface headphones, Smart Ray Bans, RayBan Meta Smart Bluetooth Glasses, and lots more).
- Wifi Info: BusinessTechnologySummit
Password: journeyteam!



Presenters



GWYN GOLDEN
ENTERPRISE SALES DIRECTOR



JIM MEYER
SR. BUSINESS APPLICATIONS
MANAGER



How Technology could have saved the day!

< quick story >

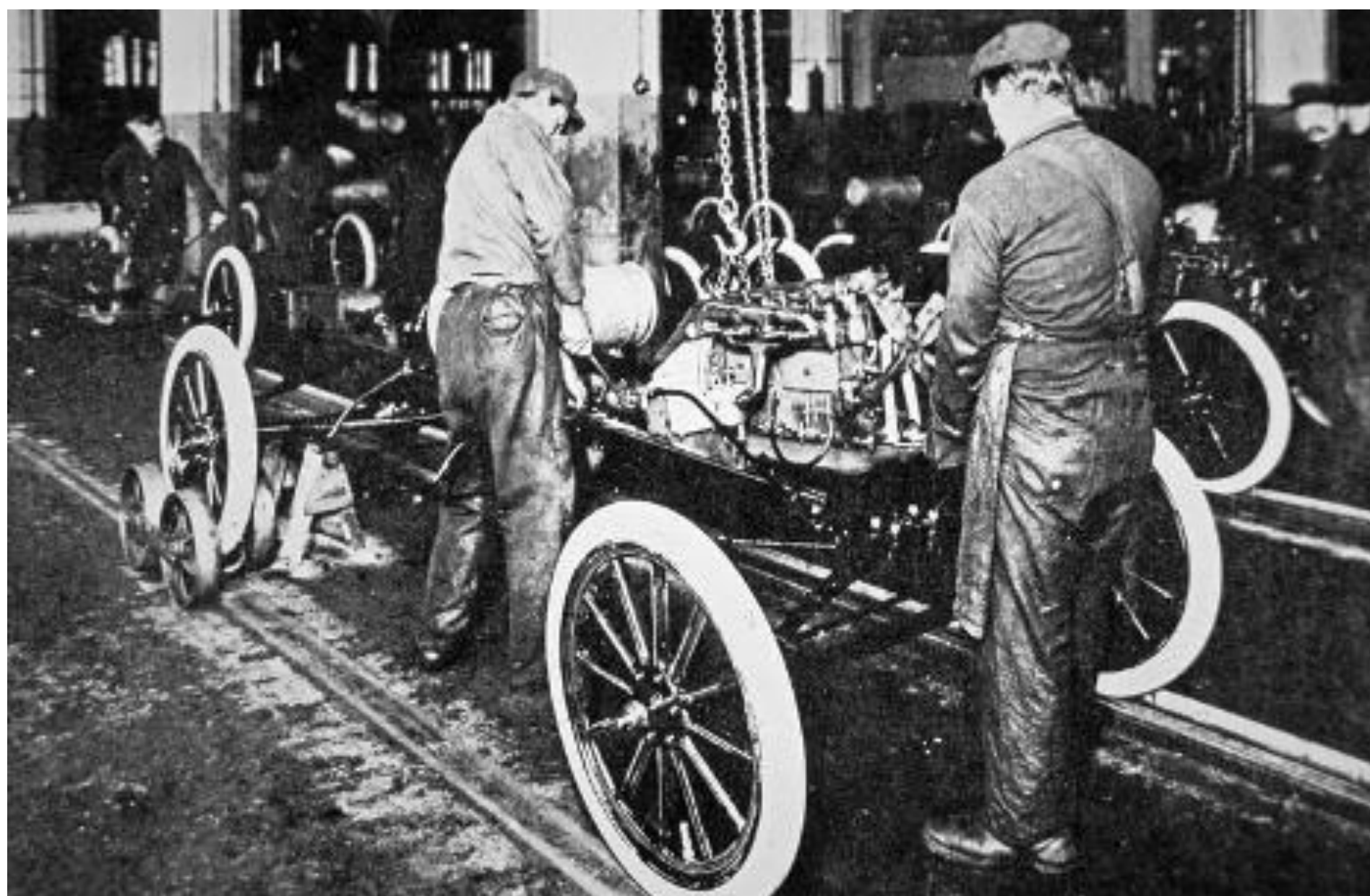


Before and After Innovation & Technology



Ford Motor Company

≈1,000 UNITLS / DAY



>8,500 UNITLS / DAY





Happy Customers = \$

How technology can improve a customer's experience with your company.





Automation is key

Companies with complex products or processes that don't offer simpler, more automated, and integrated processes for themselves and their customers will fall behind — fast.

Don't fall behind!

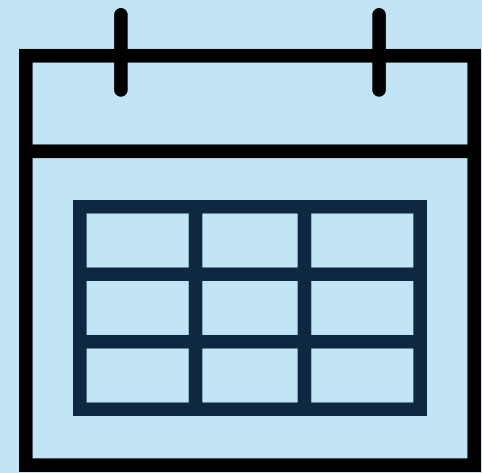
McKinsey predicts that 50 percent of all of today's work activities could be automated by 2045, due to a combination of AI and workflow automation technologies.

McKinsey, The economic potential of generative AI - June 2023 Report

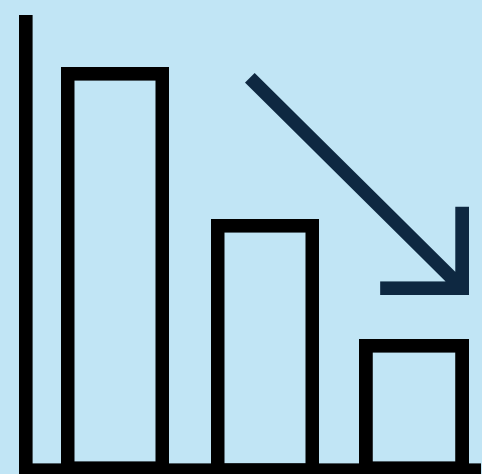


Current State

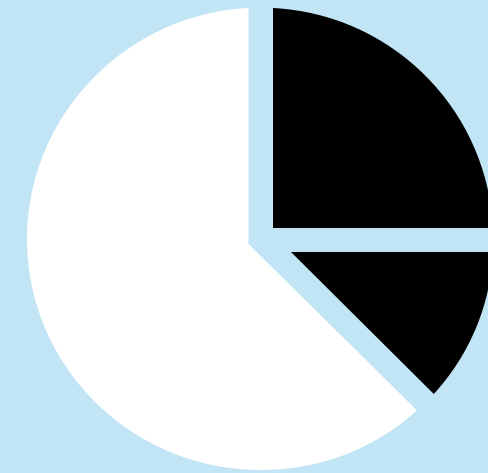
CONSEQUENCES



SLOW QUOTE
TURNAROUND



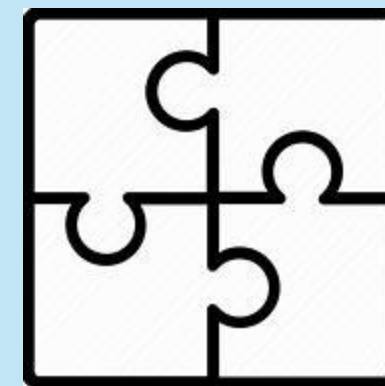
UNSCALABLE
PROCESS



SALES SPENDS
70% TIME ON
ADMIN



UNHAPPY
CUSTOMERS



RELEVANCY OF
PRODUCTS OR
SERVICES



LACK OF
VISIBILITY



INACCURATE
QUOTES



LOST REVENUE

Documents, Emails, and Forms, Oh My!

*COMMUNICATING WITH CUSTOMERS CAN BE MANUAL AND TIME CONSUMING.
WHAT IF YOU COULD AUTOMATE THE COMMUNICATIONS?*



**New Prospect
and Marketing**



**Quote and
Proposals**



**Orders and
Fulfillment**



**Invoicing and
Renewals**



**Service and
Support**



**Features and
Upgrades**

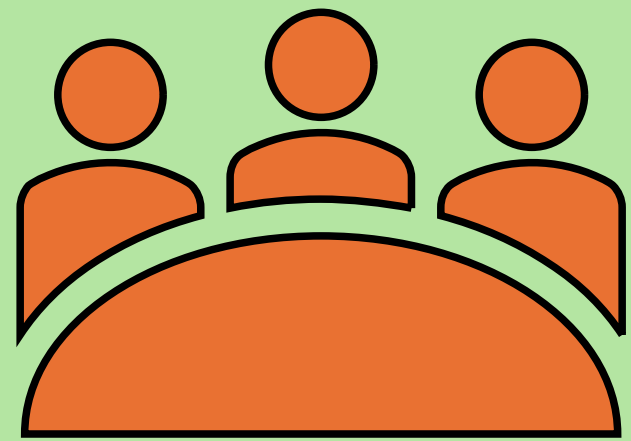


**Loyalty and
Retention**

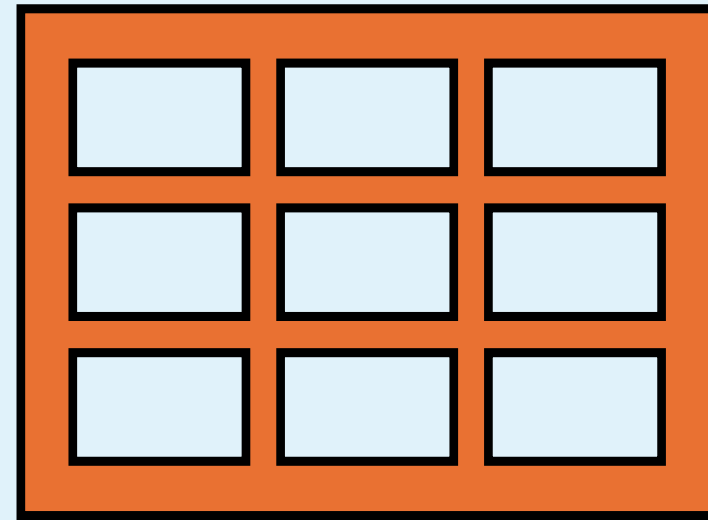


**Customer
Surveys**

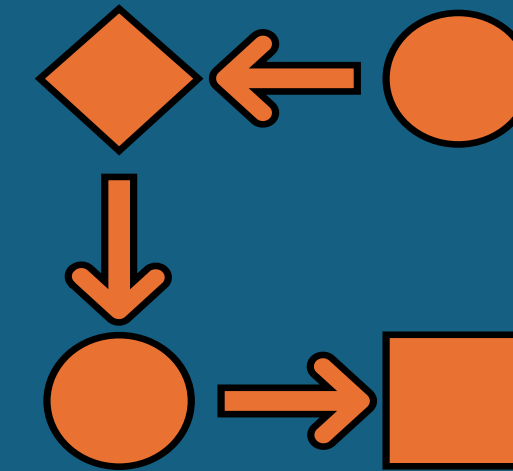
Root Causes



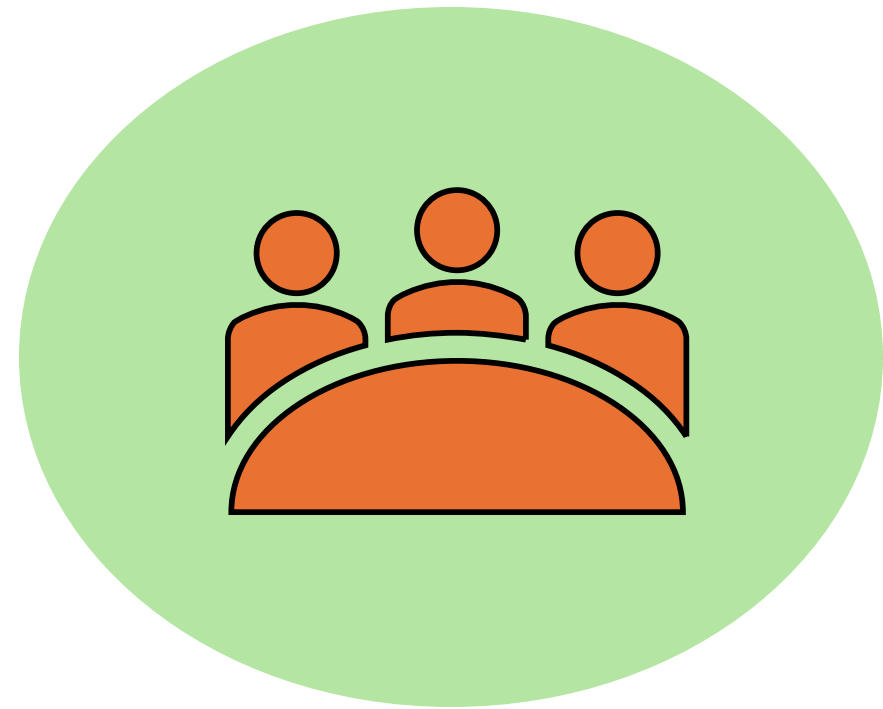
TRIBAL KNOWLEDGE



PRICING SHEET



APPROVAL PROCESS



Tribal Knowledge explained

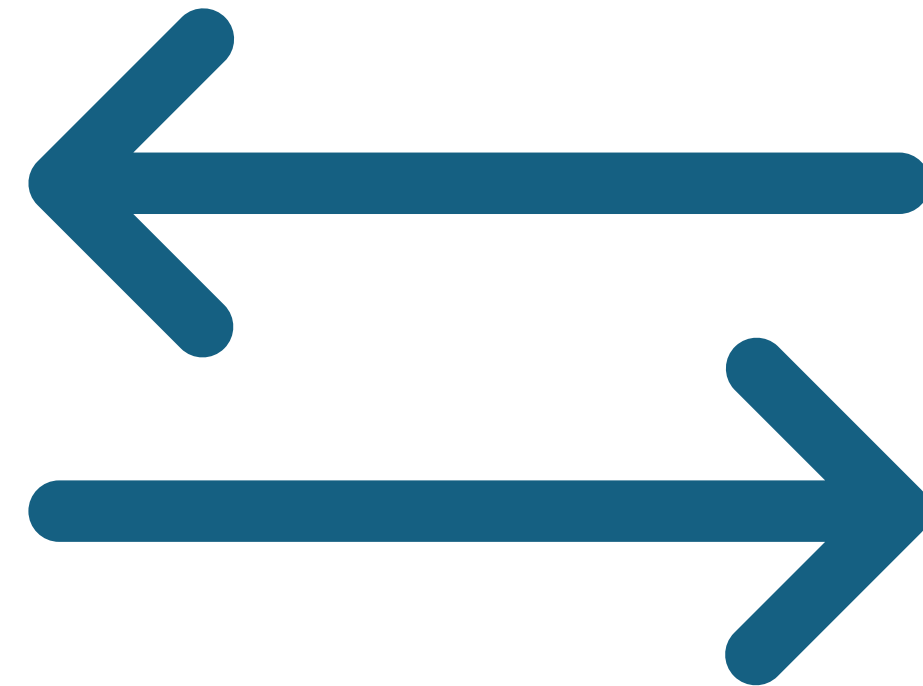
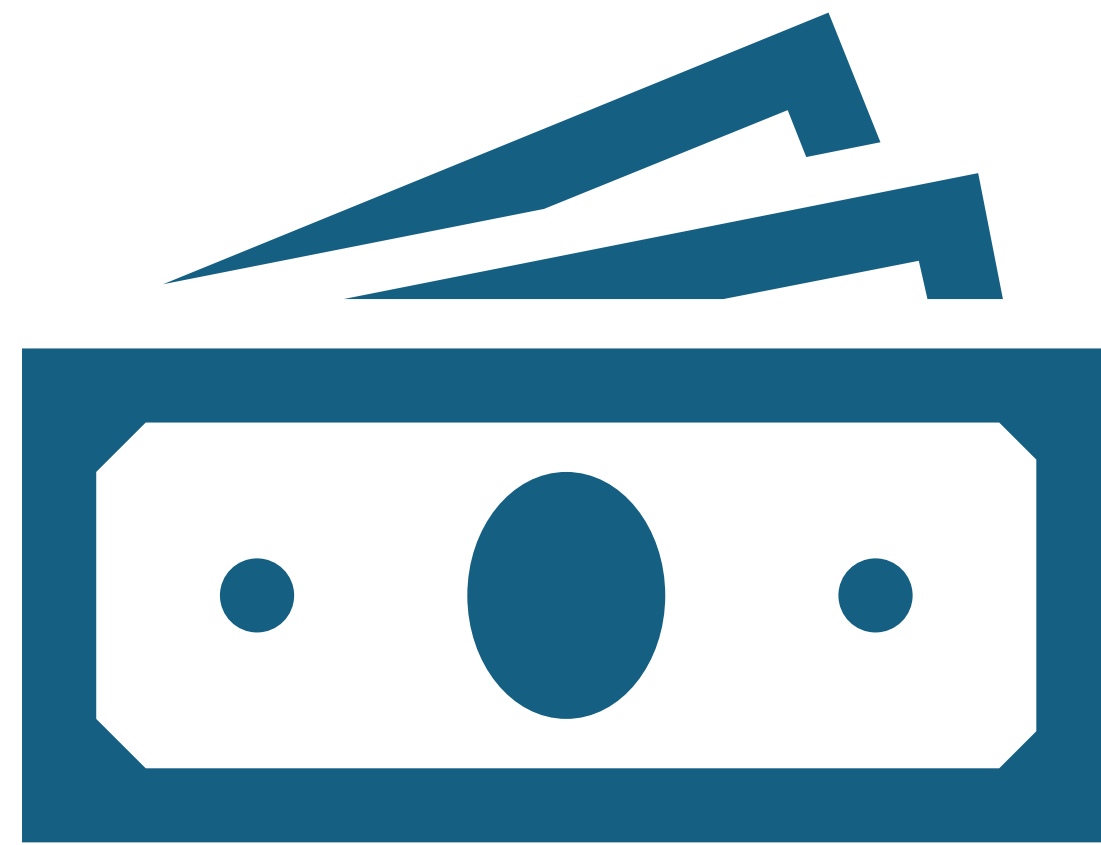
“ ... ANY INFORMATION PERTAINING TO A PRODUCT OR SERVICE PROCESS THAT RESIDES ONLY IN THE MINDS OF THE EMPLOYEES.”

ONBOARDING

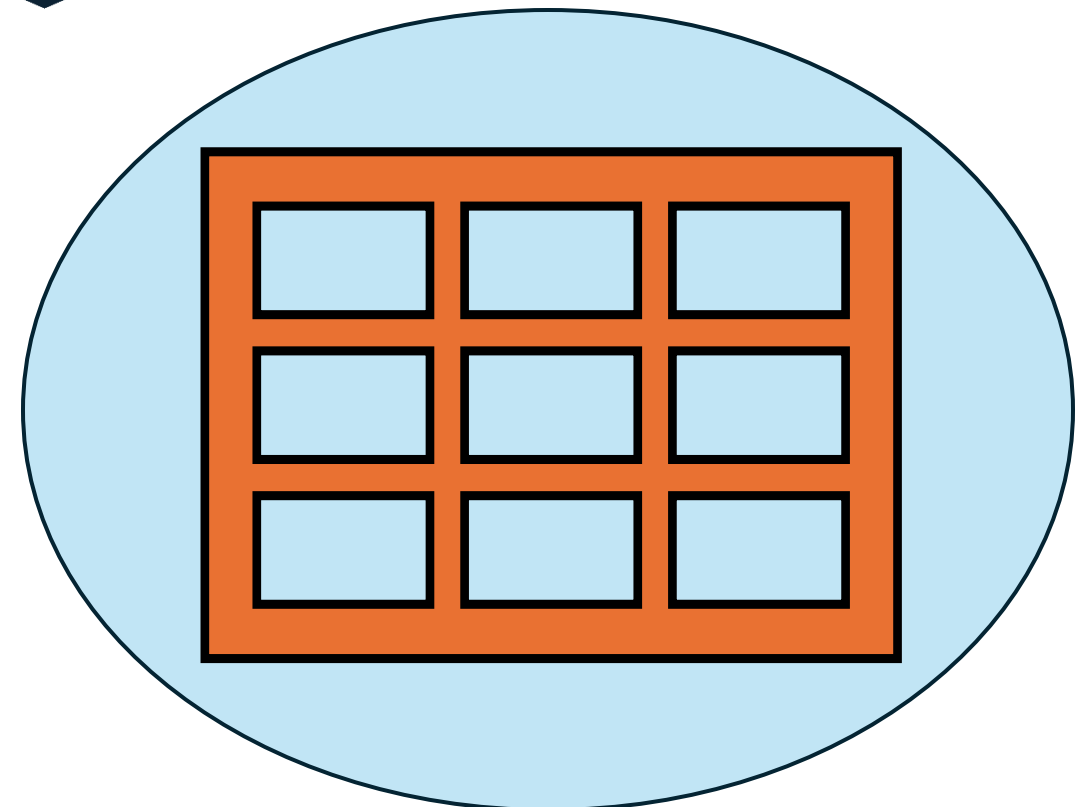




Issues with Tribal Knowledge



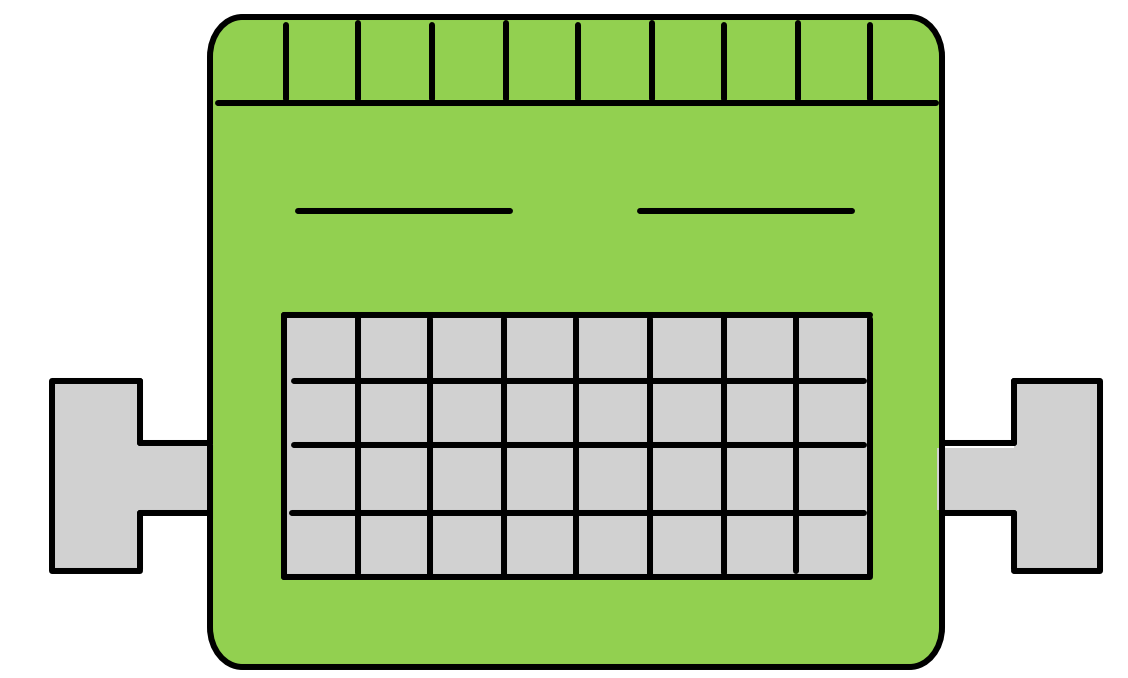
Evolution of the Pricing Sheet



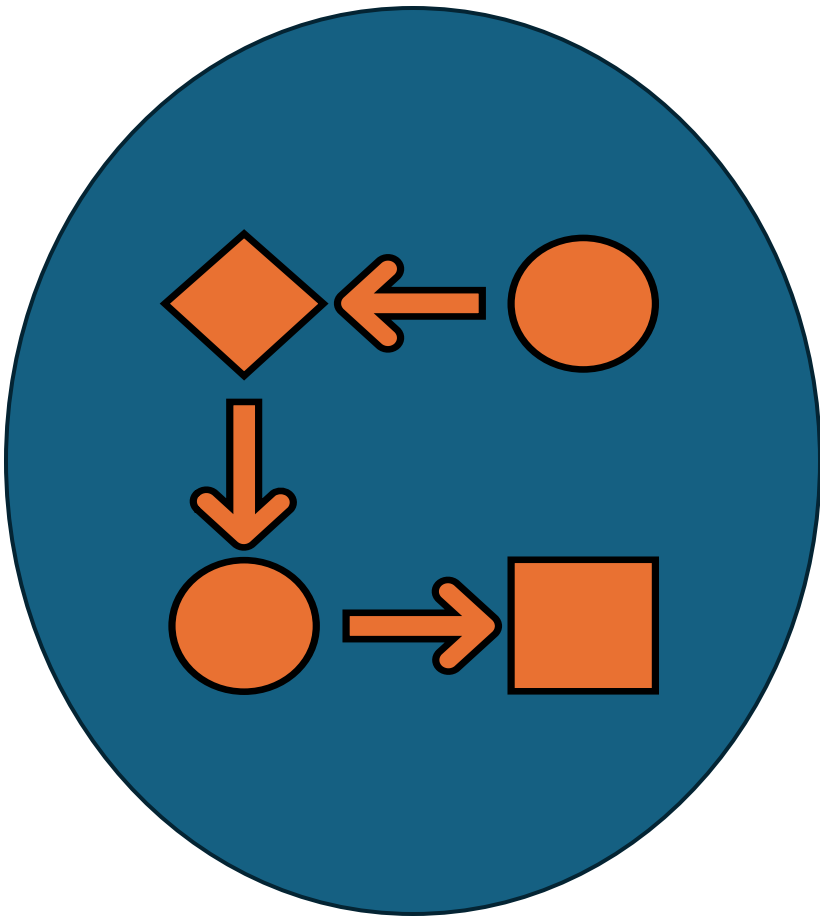
**SALES +
ENGINEERING**

**SALES +
ENGINEERING +
FINANCE**

**SALES +
ENGINEERING +
FINANCE +
MANUFACTURING**



FRANKENSHEET



Approvals

Process vs Challenges



SUBMISSION



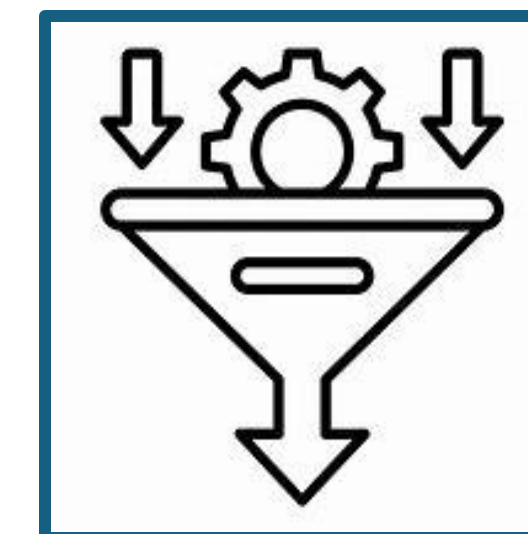
REVIEW



AUTHORIZATION



BUREAUCRACY



BOTTLENECK

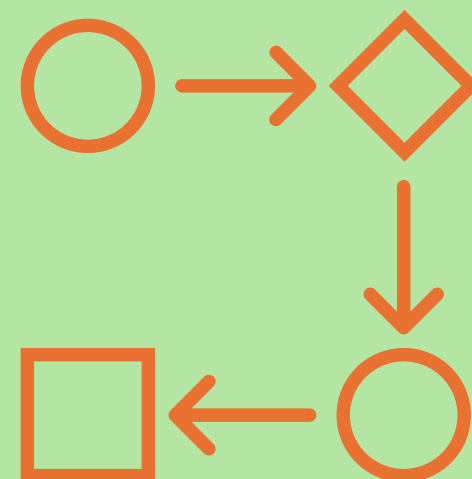


COMPLEXITY

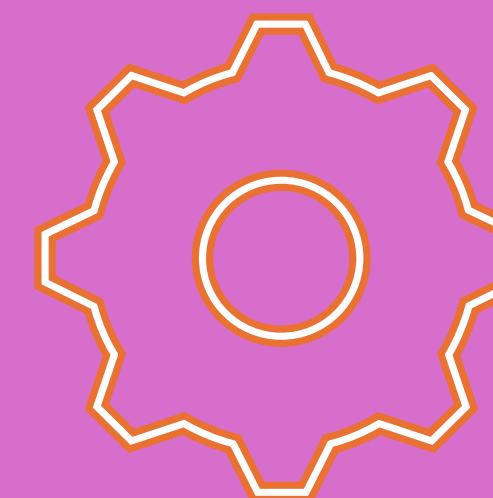
Proposed Solution



INSTITUTIONALIZE PRODUCT KNOWLEDGE

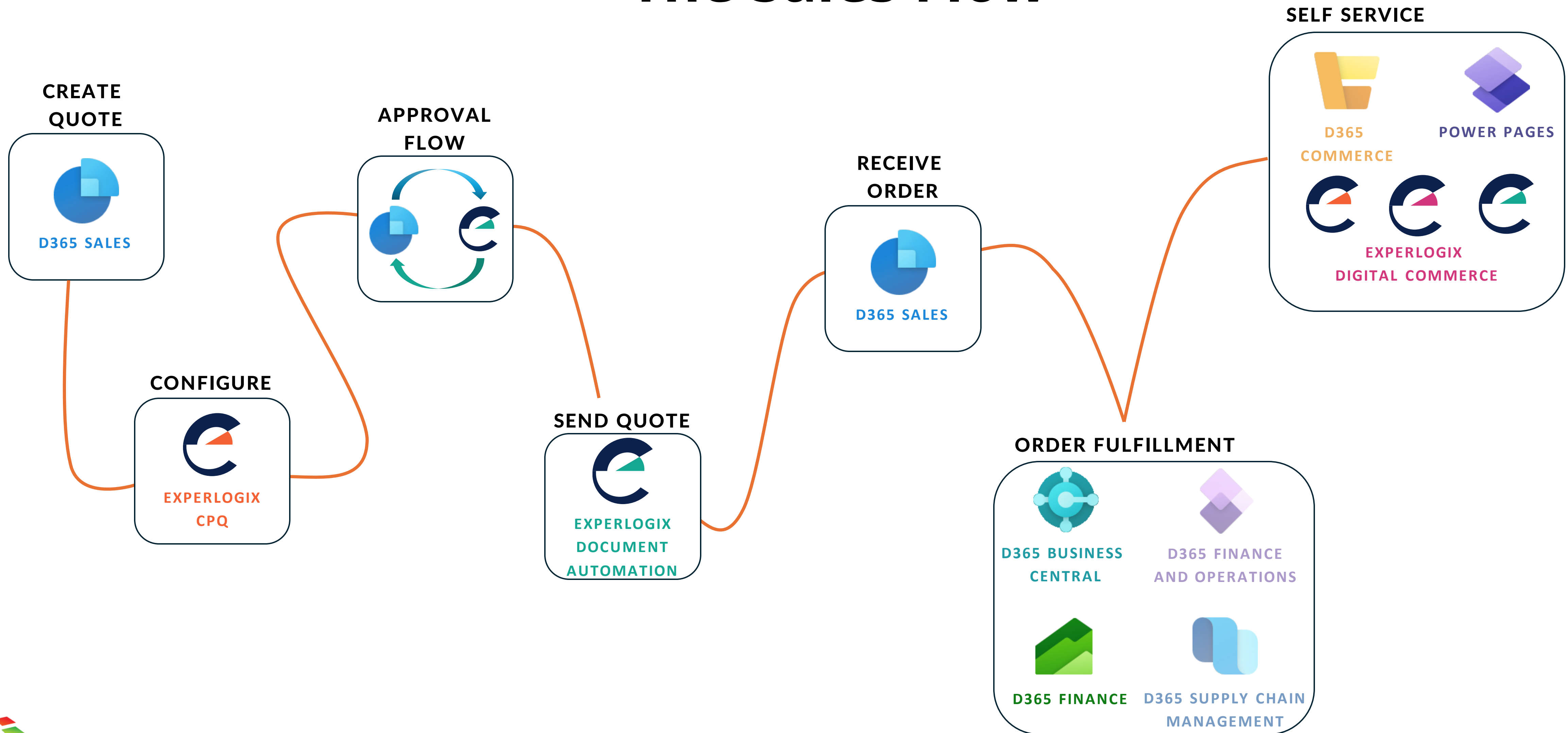


ONLY INVOLVE PEOPLE WHEN THEY ADD VALUE



AUTOMATE WHEREVER POSSIBLE

The Sales Flow



Have you ever wondered...

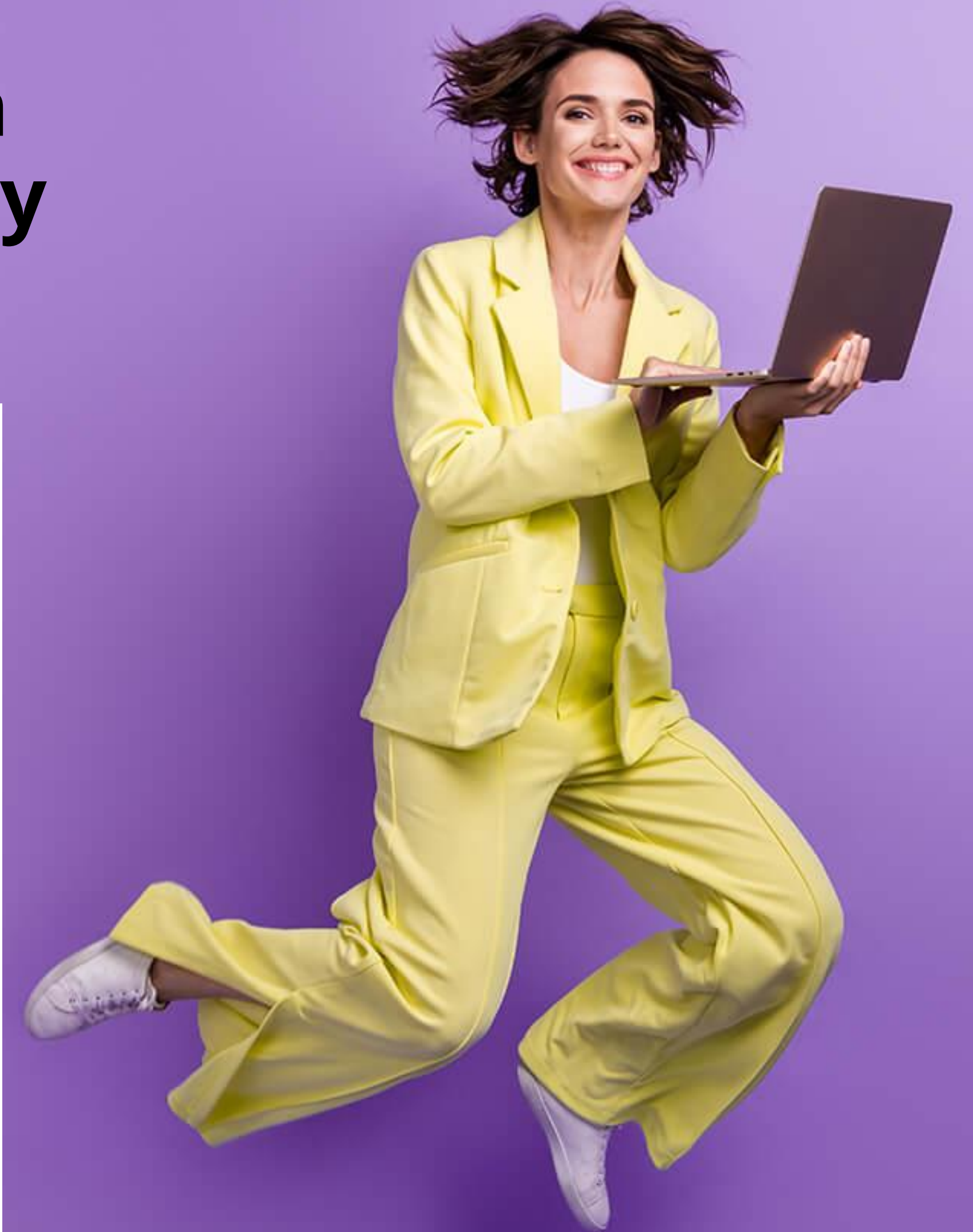


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Thank You!

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Jim Meyer

jmeyer@experlogix.com

