



Selling DocuWare Kinetic Solution for Invoice Processing!

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What are “DocuWare Kinetic Solutions”?

In a nutshell: DocuWare Kinetic Solutions

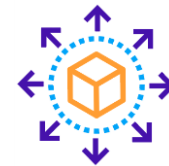
Preconfigured, cloud-delivered solutions designed to solve common business processes with simplified implementation and a fast on-ramp to value. They are the next generation of content services.



Built with the full flexibility
of the DocuWare platform



Designed from 30 years
process experience



Designed for fast, pain-
free deployment

DocuWare Kinetic Solution for Invoice Processing

Capture, route, process and archive incoming invoices to expedite payment, minimize manual touch and securely organize documents.

Features:

- Capture invoices from paper, Outlook, web mail
- Extract data with Intelligent Indexing, cloud-based machine learning
- Structured approval and booking workflow
- Integration with common ERPs like Sage, Dynamics and more

Benefits:

- Unburden employees from tiring chores to focus on more high-value activities
- Achieve high transparency and control for Finance Department
- Taking advantage of Early Payment Discounts
- Better vendor relationships



DocuWare Kinetic Solution for **Employee Management**

Centralize, secure and share employee documents related to onboarding, performance, expenses and more.

Processes:

- Centralization of personnel files
- Job application processing
- Employee onboarding
- Performance management
- Paid Time off

Benefits:

- Portray yourself as a cutting-edge employer to future employees
- Find the right employees efficiently
- Provide for smooth onboarding
- Streamline and automate routine tasks
- Stay compliant with sensitive HR records



How to sell DocuWare Kinetic Solution for Invoice Processing

Positioning: DocuWare Kinetic Solutions and DocuWare 7 Platform

Your prospect and customer base's requirements

Low complexity level of the solution

High complexity level of the solution

Prescriptive Sale

- Straight forward requirements
- Prospect is looking for “best practice” solution
- Prospect is expecting a quick, affordable implementation

Consultative Sale

- More complex requirements
- Prospect is expecting a tailored solution
- Prospect is willing to pay for longer implementation time

Sales process and implementation time

DocuWare Kinetic Solutions

DocuWare 7 Platform

Recommended General Sales Approach

Prescriptive –
DocuWare Kinetic Solutions



Consultative –
DocuWare 7 Platform



Lead with
**DocuWare
Kinetic
Solution**
first

Switch to
**DocuWare 7
platform**, if
required solution
complexity is too
high

Recommended Sales Engagement Roles

Prescriptive –
DocuWare Kinetic Solutions



Consultative –
DocuWare 7 Platform



Account Manager (DocuWare Sales Advisor)

Account Manager advances the lead as much as possible towards a **DocuWare Kinetic Solutions** close

Pre-Sales Consultant (DocuWare Application Consultant)

For open questions regarding **DocuWare Kinetic Solutions** or for a switch to the general **DocuWare 7 platform**, the Account Manager involves the Pre-Sales Consultant

Benefits of leading with DocuWare Kinetic Solutions

As an **Account Manager**
(DocuWare Sales Advisor)

- You can advance the sales process much longer on your own

As a **Pre-Sales Consultant**
(DocuWare Application Consultant)

- You can support many more Account Managers and opportunities as you spend less resources per opportunity
- You can build on a strong foundation if tweaks to the solution are still necessary
- You can spend more time on the more complex solutions

As a **Technical/PS Consultant**
(DocuWare System Consultant)

- Your implementation of DocuWare Kinetic Solutions will be pain free as it is based on pre-defined use cases
- You will have more time to focus on implementing more complex solutions

DocuWare Kinetic Solution for Invoice Processing

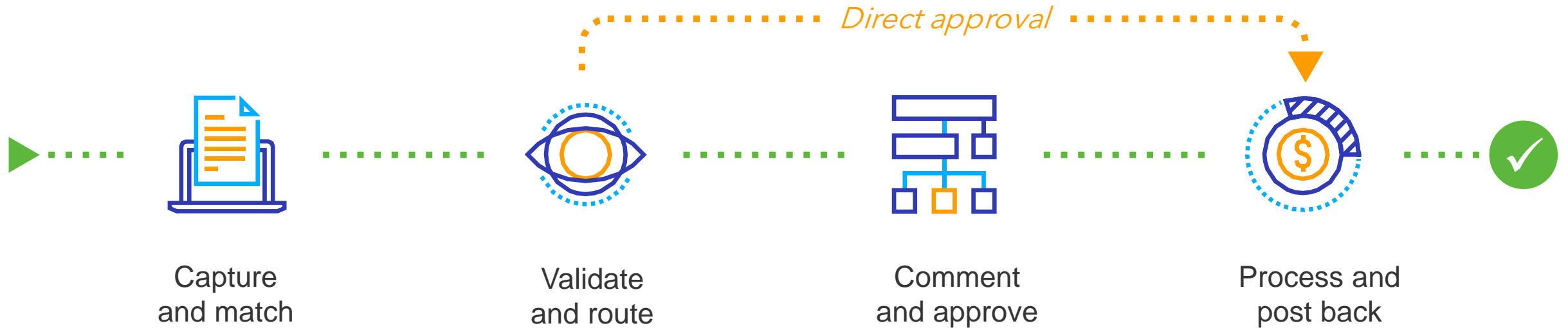
Secure and automated Invoice Processing



DocuWare
Kinetic Solution for
**Invoice
Processing**

- Rapid, accurate capture from all different sources
- Seamless, automated workflow from capture to approval to post-back
- Secure and searchable archive

Comprehensive Best Practice Solution



Delivering real value for your invoice process

Challenges today

Solved with DocuWare

Manual data entry, clerical errors, wasted time

Automatic intelligent indexing and data export

Complex coordination, delays, confusing processes

Smart, adaptable workflow and invoice routing

Security gaps, painful auditing, document loss

Business continuity, simplified auditing, compliance

Delivering real value for your invoice process

Solved with DocuWare

Get up and running
in just days

Built on DocuWare Cloud
Completely preconfigured
Fast, simplified implementation

Automatic intelligent indexing
and data export

Smart, adaptable workflow
and invoice routing

Business continuity, simplified
auditing, compliance

Scenarios for selling DocuWare Kinetic Solution for Invoice Processing

Scenario 1

Upselling an existing hardware account

Scenario 2

If you are in a competitive hardware situation

Scenario 3

If the prospect is not ready to discuss hardware.

Scenario 1

Upselling an existing hardware account

- Continue with your regular hardware business
- But set up an account review meeting with **a specific focus on solutions**
- Make sure that the CFO or Accounts Payable Director are present

Talk track:

“One way to help our customers is to improve their business processes by providing so-called Content Services. Many of our implementations start in the Finance department where most customers see a Return of Investment in just 3-6 months. Therefore, would you mind to invite your CFO or Accounts Payable Director? I can send you a small teaser video which might catch his/her interest ... !”

Scenario 2

If you are in a competitive situation for hardware

- Position yourself as solution provider
- Differentiate yourself by highlighting DocuWare Kinetic Solution for Invoice Processing
- Create a value and price which cannot be compared to
- **Most important:** Use DocuWare Kinetic Solution for Invoice Processing to involve other decision makers (CFO, Accounts Payable Director) than who are typically involved in the hardware selection process

Talk track:

“One way to help our customers – besides offering great hardware – is to improve their business processes by providing so-called Content Services. Many of our implementations start in the Finance department where most customers see a Return of Investment in just 3-6 months. Therefore, would you mind inviting your CFO or Accounts Payable Director when we present our proposal to you? I can send you a small teaser video which might catch his/her interest ...!”

Scenario 3

Prospect is not ready to discuss new hardware

- If the prospect has several years left on a hardware contract, you need a reason to build a relationship with the prospect
- Position DocuWare Kinetic Solution for Invoice Processing as the ideal solution to leverage their existing hardware setup

Talk track:

“Another way to help our customers – besides offering great hardware – is to improve their business processes by providing so-called Content Services. And these solutions work *great* with your existing hardware. Many of our implementations start in the Finance department where most customers see a Return of Investment in just 3-6 months. Therefore, would you mind introducing me to your CFO or Accounts Payable Director? I can send you a small teaser video which might catch his/her interest ...!”

Leverage powerful marketing tools (docuware.com/DKSIP-sales)

Sales process stage	Marketing tool
Getting the appointment	<ul style="list-style-type: none">• 90-second teaser video
Introducing the idea	<ul style="list-style-type: none">• 3-minute explainer video• Brochure
Presenting the solution	<ul style="list-style-type: none">• PowerPoint introduction• 12-Minute guided tour video• Statement of Work template / PO template• Case studies• FAQ
Closing	<ul style="list-style-type: none">• Statement of Work template / PO template

Sample of assets



DocuWare

DocuWare Kinetic Solution for Invoice Processing

Eliminate manual touch with auto accounts payable processes

DocuWare Kinetic Solution for Invoice Processing completely automates your invoice process, from data capture to approval to posting directly to your accounting or ERP system.

It combines modern process expertise with our zero-compromise cloud and mobile applications to eliminate the waste of manual processes and refocus your team on strategic, profit-driving projects.

According to APQC, organizations pay up to \$12.50 to process an invoice. Delays and headaches are not surprising when you consider the stream of paper and electronic invoices in different formats, with different accounting details, demanding far too much manual input. But this can be solved.

Now you can:

- Automatic and match
- Use pre-approved
- Review and
- Record and
- or ERP system
- Maintain archive for

Get up and running with DocuWare Kinetic

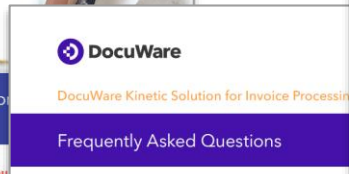
Direct approval

Capture and match

Validate and route

Comment and approve

www.docuware.com



DocuWare

DocuWare Kinetic Solution for Invoice Processing

Frequently Asked Questions

What is the DocuWare Kinetic Solution for Invoice Processing?

DocuWare has developed a solution for invoice processing based on our vast experience solutions over the past 30 years. DocuWare Kinetic Solution for Invoice Processing completely automates your invoice process, from data capture to approval to posting directly to your accounting or ERP system with our no-compromise cloud and mobile technology to eliminate the waste of manual higher efficiency and productivity.

Can the solution be configured to match the AP invoice data in your system?

Yes, DocuWare Kinetic Solution for Invoice Processing is set up with predefined users and payable (AP) process – from start to finish. The User Administration module has been completely mapped to your finance users, as well as other personnel within your organization that DocuWare uses the following predefined roles in the AP process:

- Invoice Validators confirms the invoice data is correct
- Invoice Distributors for allocating the invoice to various departments
- Invoice Approvers that are within both the finance department and various lines of business
- Book and Pay which is for posting invoices for payment

The Solution can utilize your cost centers and offers a simple workflow for your AP processing, which would include approval policies, including dollar limits, departmental approvals, and allocation of the invoice to multiple cost centers. It can create a CSV file so you can post directly to your AP system, which includes the vendor number, GL account number, cost center, dollar amount, and description of the invoice. If you also assign costs to particular project codes, we can easily accommodate that requirement.

How are new vendors and GL accounts setup?

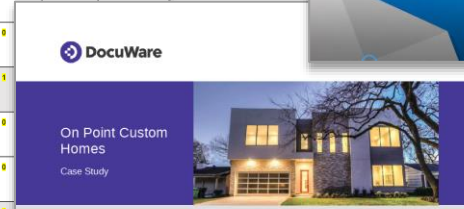
DocuWare is designed to maintain your vendors, GL accounts and cost centers in a master data file within a designated file cabinet. As invoices are captured into the system, the identified vendor is then matched to the master data record to automatically apply the vendor credit terms, as well as the ability to take advantage of early payment discounts or any other vendor-specific requirements around payment. Users can add new vendors by simply adding to the master data record. DocuWare can also write an integration to your GL and AP systems to synchronize your vendors, GL accounts and cost centers with the master data record in DocuWare so that any changes are immediately updated.

DocuWare Corporation | (888) 565-9907 | www.docuware.com | 4 Crotty Lane, Suite 200, New Windsor, NY 12553 USA

DocuWare subscription pricing

Description	Quantity	Monthly Charge
Software as a Service: DocuWare Cloud The different tiered packages contain all essential functions of DocuWare including unlimited intelligent indexing service. Fees shown are per month.		
DocuWare Cloud Base This package contains 4 Named Client licenses and 20 GB storage available for documents.	1	\$265
DocuWare Cloud Base Additional User An additional Named Client License for DocuWare Cloud Base. Any number of licenses can be added to the package.	1	\$80
DocuWare Cloud Base Additional Storage Additional 10 GB of storage space for DocuWare Cloud Base. Any number of additional storage can be added to the package.	1	
DocuWare Cloud Professional II This package contains 15 Named Client licenses and 50 GB storage available for documents.	1	
DocuWare Cloud Professional II Additional User An additional Named Client License for DocuWare Cloud Professional II. Any number of licenses can be added to the package.	1	
DocuWare Cloud Professional II Additional Storage Additional 10 GB of storage space for DocuWare Cloud Professional II. Any number of additional storage can be added to the package.	1	
DocuWare Cloud Enterprise II This package contains 40 Named Client licenses and 100 GB storage available for documents.	1	
DocuWare Cloud Enterprise II Additional User An additional Named Client License for DocuWare Cloud Enterprise II. Any number of licenses can be added to the package.	1	
DocuWare Cloud Enterprise II Additional Storage Additional 10 GB of storage space for DocuWare Cloud Enterprise II. Any number of additional storage can be added to the package.	1	
Total Amount (Year One)		

PSDI 420 Rev. A



DocuWare

On Point Custom Homes

Case Study

Custom Home Builder Strengthens IT Infrastructure and Employee Mobility with DocuWare Cloud

On Point Custom Homes implemented DocuWare Cloud to secure their data and speed invoice approvals. The results: a mobile ready, flexible, and secure system that keeps the work moving forward regardless of job location and scheduling challenges.

On Point Custom Homes is locally and nationally known as one of Houston's top builders, receiving numerous awards including Texas Custom Builder of the Year for 2017. With its focus on quality construction tailored to each client, the builder completes on average 20 homes a year ranging from design build custom homes, to remodels and spec homes. On Point strives to get to know their clients and works to meet their needs, wants and budget into a beautiful home that provides a unique reflection of the owners.

Prior to implementing DocuWare Cloud, On Point experienced a server and backup drive crash losing all their accounting documents in their electronic workflow software. After the crash, On Point reverted to a paper-based system for a few months while looking for a better solution.

Industry: Service Provider
Location: Texas USA
Application: Accounts Payable / Accounts Receivable, Electronic Workflow, Purchase Orders
Document Types: Invoices, Delivery Receipts, Supporting Documentation

On Point Custom Homes Case Study 1



DocuWare

DocuWare Kinetic Solution for Invoice Processing

Customer name

Your Name and Date

Selling DocuWare Kinetic Solutions for Invoice Processing

Step 1: Introducing the idea

Goals:

Create interest and excitement with CFO or Accounts Payable Director

How:

As part of an introductory phone call and/or email preparing for an upcoming on-site visit, include the follow marketing tools:

1. **Explainer Video** – Provides a concise and compelling overview of the solution in 3.5 minutes
2. **Brochure** – Provides a two-page summary of the solution

Selling DocuWare Kinetic Solutions for Invoice Processing

Step 2: Presenting the solution

Goals:

1. Provide general overview
2. Offer a deeper dive regarding the implementation
3. Reinforce the value of the proposed solution and address any questions
4. Gauge closing possibility

How:

As part of an on-site meeting either at the customer site or in your show room, show the following marketing tools:

1. **PowerPoint Introduction** – Gives an overview of the solution and sets the stage for Guided Video Tour
2. **The 12-Minute Guided Tour Video** – Provides a detailed, step-by-step description of how the solution works
3. **Statement of Work template / PO template** – Defines in detail how the solution will be implemented
4. **Case Studies** – Shows how other companies have already benefited from DocuWare
5. **FAQs** – Answers the most common questions for the proposed solutions

Selling DocuWare Kinetic Solutions for Invoice Processing

Step 3: Closing

Goals:

Receive the purchase order

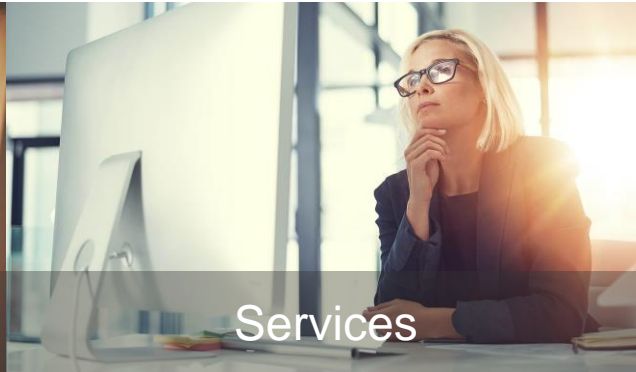
How:

At end of the on-site meeting or as a follow-up email, present prospect with a concrete proposal and ask for the signature for a PO. Available tool:

1. **Statement of Work template / PO template** – including Statement of Work which can be turned into a PO by customer signature

In case the prospect has requirements which cannot be met with DocuWare Kinetic Solutions, please include your DocuWare Application Consultant for further consultation with the prospect

DocuWare Kinetic Solutions work in any industry



And many more ...

This is your time!

Market-tested solution and ROI

No risk to upset
existing customer
relationship

Strong marketing tools

No need to learn
software demos

Prepackaged, preconfigured solutions

No danger in getting
bogged down by
scope-creep

Get going today!!!

Step 1

Download all tools for
DocuWare Kinetic Solution
for Invoice Processing

[Invoice Processing](#)

docuware.com/DKSIP-sales

Step 2

Start showing and
presenting the
DocuWare Kinetic
Solution for Invoice
Processing as part
of your account
reviews and new
customer
acquisitions

Step 3

Start closing and
become a Content
Services Sales
Superstar!

Support

If you run into questions, please contact your DocuWare Application Consultant, Regional Sales Director or call the DocuWare Sales Support hotline:

(845) 563-9045 Extension 227

“A good hockey player plays where the puck is. A great hockey player plays where the puck is going to be.”

- Wayne Gretzky



Q & A



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Thank you.