

**WORLD LEADER
IN AQUATIC PLAY
SOLUTIONS**

OVER 6,000 INSTALLATIONS IN 35 COUNTRIES

ClientPoint Case Study

Vortex Aquatic Structures Int.

“980% Decrease in time spent creating proposals!” Read how Vortex sales team went from 8 hours per proposal to only 10 minutes!

Martina Madlener - Sales and Business Systems Lead

ABOUT CLIENTPOINT

Located in Carlsbad, CA, ClientPoint a robust cloud-based business proposal creation, tracking, and management system.
Clientpoint.net 888-972-7375.

ABOUT THE CLIENT

Headquartered in Montreal, Canada, Vortex Aquatic Structures International is the world leader in aquatic play solutions. With over 6,000 installations in 35 countries, Vortex's mission is to lead the aquatic play industry by continuing to develop the most fun, innovative and safe products for families and children of all ages and abilities. <http://www.vortex-intl.com> 877-586-7839.

This case study was built from an interview with Martina Madlener, Sales and Business Systems Lead for Vortex Aquatic Structures International.



THE SITUATION

To create business proposals to win new clients, the sales team at Vortex would manually create their business proposals by writing and compiling many different documents. Some of these documents were templates while others were written from scratch.

The problems and frustrations caused by using this manual system are as follows:

- Creating proposals was very time consuming and took anywhere from 4-8 hours create a single business proposal.
- Because creating a proposal was so time consuming, sometimes sales reps would not create a proposal for a prospective client that they thought was “iffy” and not a strong contender for buying. This led to many lost sales opportunities.
- The proposals they created were inconsistent in their appearance, their content, and their corporate brand message. Depending on which salesperson created a proposal, each proposal may have a different appearance, different content included in it, and a different corporate “voice.” There was no consistency or uniformity in their business proposals. This reflected poorly on the company’s brand image and overall sales message.
- Their proposals looked similar to the proposals of their competitors. Vortex was not being seen as unique and superior. Their proposals made them look like another “me too” company within their industry.

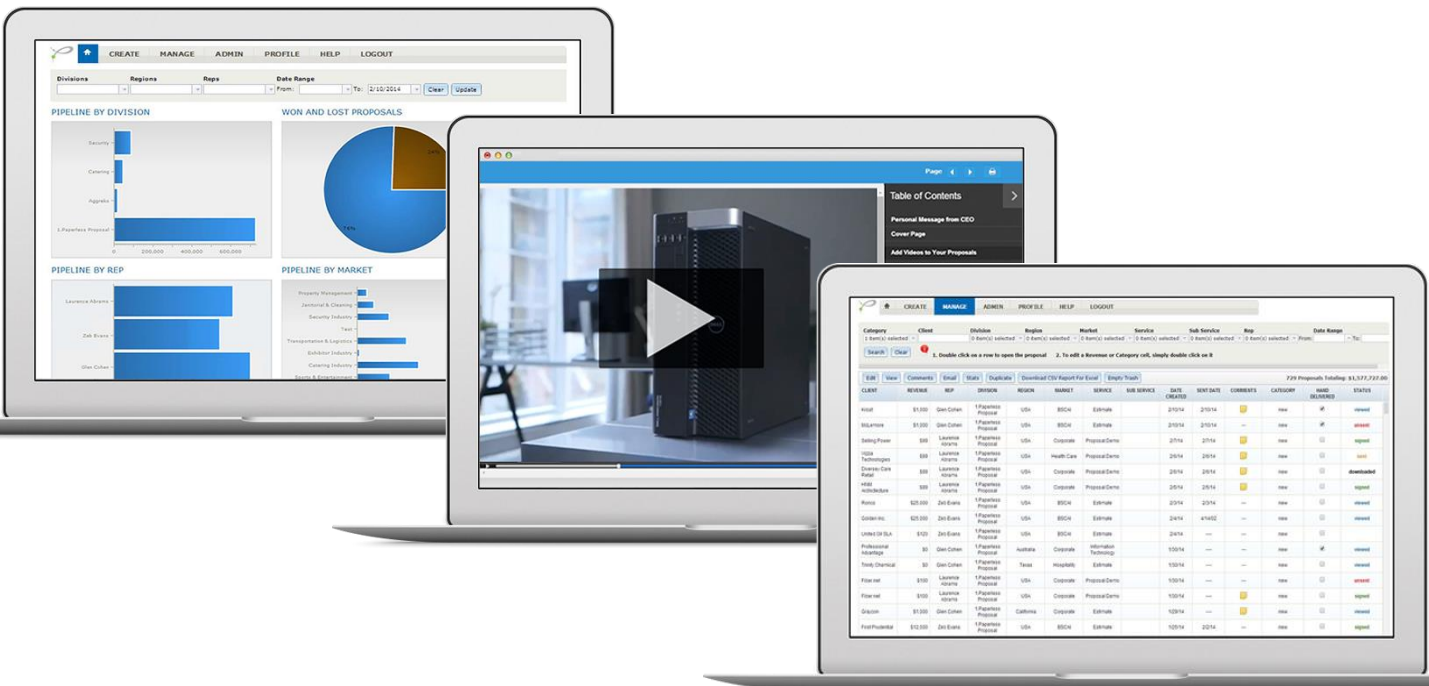
The CEO of Vortex, Stephen Hamelin, decided that their current system for creating business proposals was too time intensive and inconsistent. Stephen wanted a proposal creation system that would automate much of their business proposal creation process while at the same time making their proposals consistent, accurate, and visually attractive for their brand image. He also wanted a solution that would work seamlessly with their CRM, salesforce.com.

After reviewing different business proposal creation software vendors, Vortex chose ClientPoint as their platform gave them the most flexibility in how their business proposals could be created, tracked, and managed. And, ClientPoint was able to connect to the Salesforce.com CRM system used by Vortex.



THE SOLUTION

ClientPoint worked with Vortex to build custom business proposal templates that matched their exact business needs. ClientPoint then trained the Vortex sales teams how to use the ClientPoint system to create, track, and manage all of their business proposals.





THE RESULT

- The time it took for a Vortex salesperson to create a professional business proposal was reduced from 8 hours down to 10 minutes, a 980% decrease in time spent creating proposals. This tremendous time savings allows the Vortex sales staff to be much more productive, focusing the majority of their time interacting with prospects and clients and selling instead of sitting in front of a computer to create business proposals.
- Because creating a business proposal was now so fast and easy, the sales reps stopped their past practice of only creating proposals for the better deals and now they create proposals for all opportunities, which has helped to increase sales and market share.
- Vortex business proposals now have a professional and consistent appearance, which has helped to build their brand and separate them from their competitors.
- The sales team is now able to easily create and add personalized video clips into each proposal. Adding personalized video clips into each proposal helped make Vortex stand out among their competitors and win more new business.
- Vortex has different proposal templates available to them based on if it is their internal sales team providing a prospective client a business proposal or if it is one of their distributors providing the business proposal. This flexibility in using different proposal templates depending on which distributor Vortex was working with made it very easy to create consistent and accurate business proposals across all sales channels, even when each of those sales channels has a different company name and brand image.
- Using ClientPoint, Vortex was able to automate data sharing between the ClientPoint platform and their Salesforce.com CRM system, which made it quick and easy for them to build, track, and manage all of their business proposals. For example, when creating a proposal, ClientPoint would automatically pull from the CRM and then paste all of the cut sheets and videos that relate to every single item quoted in the proposal. The ability for ClientPoint to connect to and automatically pull information from the Vortex CRM was one of the ways Vortex was able to cut down the time it took them to create a proposal from up to 8 hours to only 10 minutes, a 980% decrease in time spent creating proposals. Automating tedious manual tasks through CRM integration is one of the ways ClientPoint makes it fast and easy to create high



quality and consistent proposals.

- As Vortex is an international company, they need to create proposals in different languages. ClientPoint automatically uses the correct proposal template and pulls documents in the correct language to make creating proposals in different languages fast and easy.

WHY MARTINA MADLENER OF VORTEX AQUATIC STRUCTURES INTERNATIONAL RECOMMENDS CLIENTPOINT TO BUSINESSES

- ClientPoint is very easy to use and it guides you through creating a proposal step by step. I find their system to be very intuitive. Our sales people are extremely busy and they want to spend their time selling—not sitting in front of a computer spending hour after hour creating business proposals. Our sales people love ClientPoint because it is so easy to use and they can create an impressive business proposal in about 10-15 minutes. I think the biggest benefit that ClientPoint has provided to us is an exponential increase in productivity for our sales team.
- We like that the customer support team at ClientPoint is so flexible and willing to help us create custom templates and documents that fit our business needs and sales process. Whenever we need help or want changes made, ClientPoint is always there for us. Instead of us trying to change how we do things to fit the ClientPoint system, ClientPoint customizes their system to fit our needs.
- We like that we can have different templates based on where we are in the sales cycle. ClientPoint is not just a one size fits all platform. You can have different customized templates to create different types of presentations, proposals, and quotes based on the type of client, the type of project, and where you are in the sales cycle. With ClientPoint there are no limits to what you can do.
- It is important to have consistent and accurate proposals that are error free. The ClientPoint system allows us to easily create proposals that are consistent and accurate and error free.
- We like that ClientPoint connects to and shares data so easily with our CRM - salesforce.com. This helps to automate much of the work we used to have to do manually.
- We get great feedback about our proposals from our prospects and clients. They enjoy the personalized videos that we include in our



proposals, and they like that are proposals are visually attractive, interactive, digital, and high tech. There is a huge difference in receiving a traditional paper-based business proposal and receiving a visually attractive and interactive digital proposal created on the ClientPoint platform. Creating business proposals using ClientPoint gives your business a true competitive advantage.

Contact us to receive a free live consultation of ClientPoint software at 888-972-7375 or online at clientpoint.net

GET A FREE CONSULTATION OF CLIENTPOINT SOFTWARE

