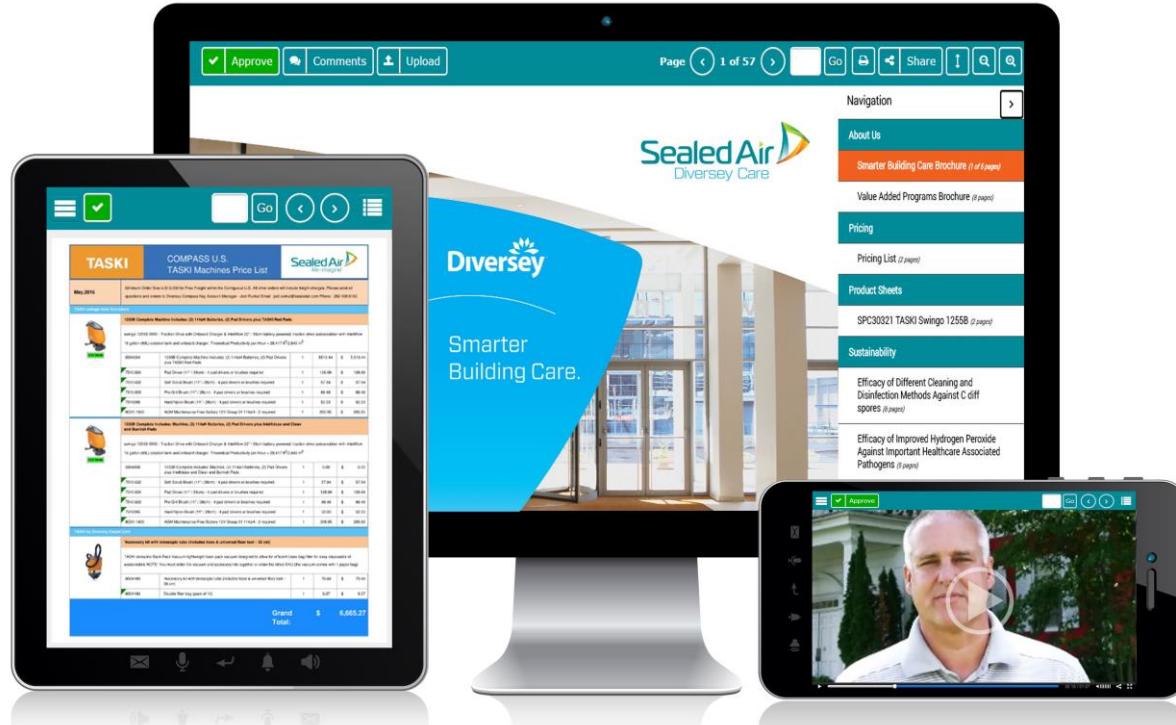


**paperless  
proposal**

# POWERFULLY VIEW AND DELIVER ON ALL DEVICES



**paperless  
proposal**

# We Have Closed The Loop



# CREATE



Create dynamic content.



Easy access to sales and marketing materials for reps and clients.



Use Word, Excel, PDF, PowerPoint, video, and web pages in your proposal.



Rapid creation of eBrochures and proposals using merge documents, pricing tools and templates.

The screenshot displays the Paperless Proposal software interface. On the left, a sidebar menu includes 'Info', 'Files' (selected), 'Send Email', 'Print & Download', and 'Preview'. The main workspace shows a hierarchical file structure under 'Glen Long Sample Proposal' with items like 'Paperless Animated Video', 'Benefits and Features', 'Testimonials and Case Studies', 'Salesforce Netsuite Integration', 'Website', 'Blogs', 'Pricing', and 'Contact'. To the right, a search bar and a detailed view of a proposal for 'Amazon.com, Inc.' are shown. The proposal details include sections for 'LIBRARY', 'Templates', and 'Recipients'. Recipients listed are 'William McBride' and 'Mr. Jeffrey P. Bezos'. The software interface is clean with a white background and blue header elements.

# MANAGE



Easy search and filter function.



Access to unsent, sent, viewed, downloaded, and signed.



Immediate notifications when viewed or signed, or when comments are posted.



Manage and monitor what sales reps are working on.

**paperless proposal**

+ New

All Proposals (246) \$ 125,000 1 selected Edit Preview Analytics Send Print Comment Tasks Enabled More

Search

Dashboard Proposals Tasks TV Filters

| Name                 | Category                       | Status  | View Status | Revenue | REP                    |
|----------------------|--------------------------------|---------|-------------|---------|------------------------|
| Amazon.com, Inc.     | Electronic commerce company    | New     | Sent        | \$1468  | Mr. Jeffrey P. Bezos   |
| Flipkart             | Electronic commerce company    | Won     | Viewed      | \$2865  | Mr. Amancio Ortega     |
| Capgemini            | Technology firm                | Lost    | Sent        | \$1542  | Mr. Warren Buffett     |
| HCL Technologies     | IT Company                     | New     | Downloaded  | \$32000 | Mr. Jeff Bezos         |
| Housing.com          | Real Estate Portal             | Pending | Signed      | \$1978  | Mr. Charles Koch       |
| Snapdeal             | Electronic commerce company    | Lost    | Viewed      | \$1500  | Mr. David Koch         |
| Tata Communications  | Technology firm                | Won     | Signed      | \$1200  | Mr. Michael Bloomberg  |
| Wipro                | IT Company                     | Won     | Signed      | \$2300  | Mr. Ingvar Kamprad     |
| MakeMyTrip.com       | Online travel company          | Won     | Downloaded  | \$1860  | Mr. Sergey Brin        |
| Zomato               | Restaurants finder             | Pending | Downloaded  | \$1250  | Mr. Liliane Bettencour |
| Cisco                | Technology firm                | New     | Signed      | \$1400  | Mr. Bernard Arnault    |
| Housing.com          | Real Estate Portal             | Pending | Viewed      | \$1978  | Mr. Charles Koch       |
| Snapdeal             | Electronic commerce company    | Lost    | Viewed      | \$1500  | Mr. David Koch         |
| Tata Communications  | Technology firm                | Won     | Signed      | \$1200  | Mr. Michael Bloomberg  |
| First Communications | Telecommunications             | New     | Sent        | \$1500  | Mr. Ingvar Kamprad     |
| Geoglobe             | Geographic Information Systems | Lost    | Sent        | \$1200  | Mr. David Koch         |
| Horizon              | Software                       | New     | Sent        | \$1500  | Mr. Charles Koch       |
| Denco                | Manufacturing                  | New     | Sent        | \$1500  | Mr. Bernard Arnault    |

Comments (4)

Add comment

Click here to add a Comment

Internal Comment 3 people will be notified Post

Past Comments (6) Showing All Comments ▾

Meeting has been postponed to tomorrow. by Me Today at 1:57pm

We are agree with your new pricing. by john\_seely@amazon.com Today at 1:57pm

Pricing page is not completed yet. also add all plans comparison table on it by Zetulion Evans Today at 1:57pm

Pricing page is not completed yet. also add all plans comparison table on it by Zetulion Evans Today at 1:57pm

Meeting has been postponed to tomorrow. by Me Today at 1:57pm

We are agree with your new pricing. by john\_seely@amazon.com Today at 1:57pm

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# REPORTS



## Activity Reports



Manage and monitor what sales reps pipelines

Sales Pipeline Overview

This dashboard provides a comprehensive view of your sales pipeline across various dimensions.

**Proposals:** A line chart showing the number of proposals over time (Jan to Dec) for different sales representatives. The chart includes data for Jeffrey P. (blue), Zebulon Evans (orange), Lauren Alana (green), and John B. Cooper (red).

| Month | Jeffrey P. | Zebulon Evans | Lauren Alana | John B. Cooper |
|-------|------------|---------------|--------------|----------------|
| Jan   | 8          | 5             | 4            | 3              |
| Feb   | 10         | 6             | 5            | 4              |
| Mar   | 12         | 8             | 6            | 5              |
| Apr   | 15         | 10            | 8            | 7              |
| May   | 18         | 12            | 10           | 9              |
| Jun   | 20         | 15            | 12           | 11             |
| Jul   | 22         | 18            | 14           | 13             |
| Aug   | 25         | 20            | 16           | 15             |
| Sep   | 22         | 18            | 14           | 13             |
| Oct   | 18         | 15            | 12           | 10             |
| Nov   | 15         | 12            | 10           | 8              |
| Dec   | 12         | 10            | 8            | 6              |

**Pipelines:** A bar chart showing the total value of deals by sales representative. The chart includes data for Mr. William McBride (blue), Jim Davis (orange), Lauren Alana (green), Administrator (yellow), Glen O'Brien (purple), and John B. Cooper (red).

| Representative      | Total Value |
|---------------------|-------------|
| Mr. William McBride | \$35K       |
| Jim Davis           | \$200K      |
| Lauren Alana        | \$180K      |
| Administrator       | \$100K      |
| Glen O'Brien        | \$80K       |
| John B. Cooper      | \$120K      |

**Overall Proposals Status:** A pie chart showing the distribution of proposal status. The chart includes data for Pending (76%), Won (20%), and Lost (10%).

| Status  | Percentage |
|---------|------------|
| Pending | 76%        |
| Won     | 20%        |
| Lost    | 10%        |

**Recent Activities:** A list of recent interactions and comments from sales representatives.

- jeff.bco@amazon.com signed the proposal Flipkart
- john.swey@amazon.com added comment: We are agree with your new pricing on HGS Technologies
- john.swey@amazon.com downloaded the proposal Makemytrip.com
- Zebulon Evans posted the proposal Capgemini
- john.swey@amazon.com added comment: We love your services but some other companies giving us 20% discount.
- jeff.bco@amazon.com viewed the proposal Tata Communications

# TRACK



Know who viewed and downloaded your proposal, how many times it was viewed and the duration, and who it was shared with.



Gain valuable insight into who the actual decision makers are.



Track most to least time spent on each page of the proposal.



View stats of individual sessions.

The screenshot displays the Paperless Proposal Analytics dashboard with the following sections:

- Views:** 15 total views, 8 unique visitors, 11 Oct, 2016 (4:47 PM - 5:48 PM). Includes a list of viewers with their last viewed times and a pie chart of top 9 viewers by duration.
- Engagement:** 45 mins total time spent, 3 mins average time spent, 8 shares, 13 comments, 4 likes, 62 reactions.
- Activity:** A section showing document details and a pie chart of file types and sizes.
- Documents (30):** A list of documents with their names, page counts, total time spent, total views, unique viewers, and last viewed times.
- Document Was Emailed To:** A table showing emails sent via email, method, time, and status (Sent, Viewed, Downloaded, Signed).
- Document Was Shared With:** A table showing emails shared via Paperless, method (Email), shared by, time, and status (Sent, Viewed, Downloaded, Signed).
- Document Was Downloaded By:** A section stating "Proposal has not been downloaded yet".
- Attachments Were Downloaded By:** A section stating "Attachments have not been downloaded yet".

# Some of our Customers



# CASE STUDY



## Vortex Aquatic Structures International



### The Situation

The sales team at Vortex would manually create business proposals by writing and compiling many different documents. Some of these documents were templates while others were written from scratch. The average time was 4-8 hours per proposal, and they were inconsistent in their appearance, content, and corporate brand message, and were not differentiated from their competitors.

### The Solution

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

### The Result

98% Decrease in time spent creating proposals. Vortex sales team went from 8 hours per proposal to only 10 minutes.

# CASE STUDY

## Securitas USA



### The Situation

Securitas North America was first using an internal MS Word sales proposal template they created in-house. They were not satisfied with it so they switched to a commercial proposal creation system offered by a competitor of Paperless Proposal, which was not much better than using MS Word and was very time consuming and cumbersome.

### The Solution

Paperless Proposal worked with the management team at Securitas North America to build custom business proposal templates that matched their exact business needs and brand image. Securitas management receives great value from the robust proposal tracking, analytics, and reporting tools offered by Paperless Proposal in the Proposal Management Center. Paperless Proposal gives them a strong competitive advantage in their marketplace.

### The Result

Securitas USA sales team went from 3 hours per proposal to only 30 minutes increasing sales productivity by 600%. This translated to a 25% increase in their 2015 sales over prior years.

# 3

## CASE STUDY

### Mauzy Heating, Air and Solar



**MAUZY**  
HEATING • AIR • SOLAR



#### The Situation

Mauzy were using a 2-part NCR form that they would complete by handwriting the required information. The proposals were time consuming, inconsistent and error prone, and did not look professional because much of the proposal was handwritten. They were difficult to track and manage and not easily accessible, trackable, and in a manageable digital format.

#### The Solution

Paperless Proposal worked with Matt Mauzy and his team to build a proposal template that matched his business needs. Matt and his team were then trained on how to use the Paperless Proposal system to create, track, and manage all of their business proposals.

#### The Result

100% Increase in Sales from \$5.7 million in 2014 to \$11.4 million in 2015. 75% Reduction in time spent creating proposals from 20 mins to less than 5 mins. Proposal data errors were reduced by over 95%.



# LEADERSHIP



**Laurence Abrams**  
**CEO**

A successful serial entrepreneur, passionate mentor about the use of technology and innovation within organizations to differentiate, streamline, and automate the organization's sales processes and solutions to create explosive growth. Laurence developed Paperless Proposal for GMI out of the need to differentiate his company in the sales and marketing process from his competition.



**Zeb Evans**  
**CTO**

CTO responsible for overseeing the development of all software for Paperless Software, Inc. Prior to joining Paperless Software Inc., Zeb developed web application and web infrastructure expertise while re-architecting the fixed web application for the Sprint, Virgin Mobile and Amp'd Mobile game communities while at Motricity.



**Glen Cohen**  
**CMO**

As a co-founder Glen leads the business development and marketing team. He brings more than 25-years experience in inbound and outbound marketing, communications and sales enablement. Glen was the co-owner of a start-up restaurant chain and later the CEO of GlenCo Advertising, a creative services and web based technology firm, working with a prominent client base.



**Clifford Boro**  
**Board of Directors**

Co-Founder at Team Group, Board Member 6Sense, 1AppWorks. Former CEO Infogate (sold to AOL) Named White House Champion of Change.

# paperless proposal

Thank you