

# **paperless** **proposal**



# We Have Closed The Loop





# 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.

The screenshot displays the Paperless Proposal software interface. At the top, there's a navigation bar with the logo, a '+ New' button, a search bar, and tabs for 'Dashboard', 'Proposals', and 'Tasks'. Below this is a summary bar showing 'All Proposals (246)', '\$ 125,000', '1 selected', and various action buttons like 'Edit', 'Preview', 'Analytics', 'Send', 'Print', 'Comment', 'Tasks', 'Enabled', and 'More'. The main area is a table of proposals with columns for Name, Category, Status, View Status, Revenue, and REP. The 'HCL Technologies' proposal is highlighted. To the right, a 'Comments (4)' sidebar is open, showing an 'Add comment' form and a list of 'Past Comments (6)'.

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	\$22000	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 Bettencourt
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

# REPORTS



Activity Reports



Manage and monitor what sales reps pipelines

The dashboard features several key sections:

- Activity Board:** A summary of proposal activities with filters for 'User All Users'. It includes metrics for Created (2,870), Viewed (2,570), Signed (1,368), Won (1,045), Unsent (176), Amount for Won (\$1,2548.00), and Amount for Pending (\$1,468.00).
- Proposals Table:** A table listing proposals with columns for Name, Revenue, Assign to, and Created Date. Recent entries include Amazon.com, Inc. (\$1,160), HCL Technologies (\$7865), Housing.com (\$1,647), Flipkart (\$37000), Unigeneral (\$1573), Tata Communications (\$1002), MuleSoft (\$1200), and Flipkart (\$22000).
- Recent Activities:** A log of user actions such as 'jpr.koccos@amazon.com signed the proposal Flipkart' and 'John Srely@amazon.com added comment'.
- Proposals Chart:** A line graph showing monthly proposal trends from January to December for users Jeffrey F., Zubulov E., Caglayan C., and Tural V.
- Pipelines:** A bar chart showing the value of proposals across different stages: Sales Present, Sales Follow-up, Jan Onfile, Laurence Adams, Administrative, Open Quotes, and Jan 8 Close.
- Tasks:** A list of action items with due dates and assignees, such as 'Call to client and show him proposal' and 'Update all files by today'.
- Overall Proposals Status Chart:** A pie chart showing the distribution of proposal statuses: Pending (70%), Won (20%), and Lost (10%).

# 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 interface. At the top, it shows 'Views' (15 Total Views, 8 Unique Viewers, 11 Oct, 2016 Last Viewed), 'Engagement' (45 Min Total Time Spent, 3 min Avg Time Spent, 8 Engagement Task), and 'Activity' (13 Downloads, 4 Shared, 62 Comments). Below these are sections for 'Viewers (5)', 'Documents (3)', and 'Document Was Emailed To'. The 'Viewers' section includes a table of viewer statistics and a pie chart showing top viewers. The 'Documents' section includes a table of document statistics and a pie chart showing top files. The 'Document Was Emailed To' section includes a table of email events. At the bottom, there are sections for 'Document Was Shared With' and 'Document Was Downloaded By'.

Viewer	Total Views	Total Time Spent	Last Viewed	More Info
ron.norman@securlastic.com	10	2 hours	33 min ago	More Info
david@batmac.com	7	56 mins	50 min ago	More Info
gaganmurghe@softobiz.com	3	40 min	4 days ago	More Info
ron.norman@securlastic.com	3	37 min	2 months ago	More Info
topgoverna@softobiz.com	1	12 min	6 months ago	More Info

Document	Total Time Spent	Total Views	Unique Viewers	Last Viewed	More Info
Exhibit.LantronPhong # pages	40 min	13	5	33 min ago	More Info
Exhibit.LantronPhong # pages	56 min	8	2	50 min ago	More Info
Exhibit.LantronPhong # pages	36 min	16	6	4 days ago	More Info
Exhibit.LantronPhong # pages	30 min	26	1	1 week ago	More Info
Exhibit.LantronPhong # pages	45 min	10	5	2 months ago	More Info
Exhibit.LantronPhong # pages	45 min	6	3	6 months ago	More Info

Shared To	Shared By	Time	Status
david@batmac.com	ron.norman@securlastic.com	20 Sep, 2016 at 7:43 pm	Share
ron.norman@securlastic.com	ron.norman@securlastic.com	28 Oct, 2016 at 5:38 pm	Viewed
gaganmurghe@softobiz.com	ron.norman@securlastic.com	20 Sep, 2016 at 7:43 pm	Downloaded
gaganmurghe@softobiz.com	ron.norman@securlastic.com	20 Sep, 2016 at 7:43 pm	Signed

# Some of our Customers



# 1

## 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.

# 2

## 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



#### 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.



**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.



**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.



**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