

Case Study:

Smarsh Significantly Reduces Proposal Generation Time With Automation Through WorkRails

Who is Smarsh

Smarsh is a multinational "software as a service" (SaaS) company headquartered in Portland, Oregon. The company provides comprehensive digital communications archiving and has compliance, supervision and e-discovery solutions for companies in highly regulated industries, including public sector and financial services.

What was their problem?

Like most SaaS organizations, Smarsh was creating bespoke proposals for every individual deal. Their process included a 300+ line questionnaire Sales needed to complete in order to get accurate pricing and to generate a proposal. The process, although effective, was very manual causing their average turnaround time for each custom document to extend over 3 weeks from start to finish.



How did we fix it?

WorkRails provided a guided selling process to take the guesswork out of the proposal generation for Smarsh helping them save time, effort, and increase document accuracy.

Using WorkRails, Smarsh turned their service offerings into standardized packages that could be automated through a guided selling tool for sales to generate their own proposals in minutes instead of weeks.

Smarsh used WorkRails' Salesforce.com integration to create a seamless experience for the sales team working directly in the opportunity window within Salesforce. Sales was then able to pull up their professional services catalog, answer a few questions and add services to a shopping cart within minutes generating a preview of the completed drafted document.

Smarsh was able to take the the domain expertise of the professional services team, build it into WorkRails and allow a salesperson to quickly and accurately configure a proposal. This resulted in a significant reduction in the manual effort from the professional services team to gather information and generate proposals.

"The WorkRails team has been a true partner with us in this journey. They understand our products and services and are always thinking outside the box for ways to make proposal generation even easier for us. They are extremely responsive to any and all requests and take extreme ownership to ensure we are achieving the right outcomes".



No one is doing what WorkRails is doing. None of the other vendors we looked at were even close to what we could get with WorkRails. WorkRails has been a game changer for us."

Katie Carpenter, VP Professional Services, Smarsh



Results?

- 99% decrease in time to generate a proposal
- Elimination of offline documents to track deal details
- Ability to manage a single proposal template across all offerings
- Single pane of glass to see all offerings across departments

