

# Top Line Assessment

Attract New Customers. Improve Customer Loyalty. Grow Your Business.

The Top Line Assessment focuses on key business drivers for companies that will grow through an improved quote-to-order process. By understanding the process and the key business drivers, Endeavor Commerce can identify and recommend solutions that can help attract new customers and improve relationships with existing customers.

**Fact: Every organization prepares quotes and/or takes orders.**

- All 'for profit' companies that deliver goods or services provide some form of quote to their prospects and/or create orders to fulfill a commercial agreement.
- This is the starting point for all commerce to occur.

**Fact: 9 out of 10 companies treat quoting separately from ordering.**

- Most companies hold their sales teams accountable for preparing quotes while another group is responsible for processing the orders.
- The majority of companies do not have a clearly defined process flow that articulates the various groups that impact the quotes and orders.

**Fact: Quote-to-Order process is the least automated and least measured area of an enterprise.**

- Large companies that have a significant investment in an ERP system typically manage their ordering functions and may even attempt managing quotes in their ERP system.
- Some companies' typical solution is to prepare quotes through a Customer Relationship Management (CRM) system. Seldom are they capable of generating proposals or passing the critical order data to a fulfillment system.
- Other companies create a quote tool, sometimes many. It may be a spreadsheet, database or custom built quoting tool that is difficult to maintain and does not pass order data to back-end systems for processing.
- Focus on measurements is non-existent. Seldom can companies create a measurement that would show the effectiveness of the process in quote conversions, average order size, cost of preparing quotes, proposals or orders.

**Fact: Quote-to-Order process impacts Revenue, Profitability and Customer Satisfaction**

- The quote-to-order process is the single link between top-line, bottom-line results and customer satisfaction. No other process is as critical for maximizing the value of capturing revenue in a profitable way and meeting the needs of customers.
- This process takes on the collective intelligence of the enterprise.

*"Endeavor's TLA methodology allowed us to re-evaluate our entire Quote to Order process. The Endeavor team worked the real issues and presented to us the solutions to over come these issues."*

**Dave Prince, Senior Director  
Roll Coater, Inc.**

*"Endeavor focused in on the key issues that impair our business growth and presented a clear plan on what we have to do to implement a holistic solution that will improve our top and bottom lines."*

**Jeff Cade, President  
MAI Doors, Inc.**

*"With multiple lines of business, the Endeavor team identified a unified strategy that will help us apply a structured quote-to-order process throughout the company. By being able to quote accurately every time, we will eliminate multiple touches and manufacturing errors."*

**Matt Gidley, Director  
Marquip Ward United, Inc.**

# Top Line Assessment Process Flow



## Set Goals and Identify Q2O Process Participants

The goals need to be defined and the expectations set that the project will generate increased revenue, reduced cost of sales and create a repeatable sales process. All process participants are identified that contribute to the Q2O process.

## Capture Current Process and Metrics

The quote-to-order processes should be documented with the 'as is' state to understand where the complexity, duplication and disconnected flows exist. The gathering of metrics occurs during this phase.

## Q2O Process Analysis

Evaluating the process, metrics and defining the requirements are key activities during this phase of the project. The subject matter experts and decision makers must be involved to produce a meaningful requirements document and issues list.

## Develop Roadmap and ROI Metrics

The new quote-to-order process flow should take into consideration the prioritized issues from the analysis, resources and tools available, and the goals of the process improvement project. The Roadmap will guide the organization through the implementation project to achieve the final state. The overall objectives of streamlining the process should be to simplify the complex sale, reduce the activities that do not add value to the process, reduce the number of interactions to complete the process, delegate authority to the lowest level possible and employ tools that will provide consistent accurate quotes and proposals. ROI metrics will be developed that can be easily generated that don't create a burden on the process to capture.

## Present Recommendations

A final presentation to the leaders of the organizations involved with the Q2O process will articulate the high-level 'as-is' process and convey the issues and possible solutions that the company can move forward with in developing an overall plan to improve the processes. The future state will be a streamlined process that will eliminate waste and provide a basis for deciding the appropriate action plan.

## Top Line Assessment Outputs

**ROI Metrics.** These metrics will be the basis for evaluating the investment required, the benefit to the company and the estimated returns that should be expected when fully implemented.

**Q2O Roadmap.** This is a planned implementation process to move from the present state to the future state, the estimated time to implement each phase of the project and an expected time frame to complete.

**Final Presentation.** The communication of the current process, future process and the possible solutions and recommendations are prepared and presented to the leaders of the organization.

## Want to get started?

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Endeavor Commerce is the leading sales configuration and interactive selling software provider for the mid-sized enterprise. We



help companies with complex products, services and pricing. This enables them to increase sales, decrease costs and increase customer satisfaction by automating their quotation and order entry processes across sales, partner and customer channels.

Endeavor's Smart Catalog solutions are sold with market leading CRM and eBusiness applications from Microsoft and Sage Software, and as stand alone Interactive Selling Systems. Our technology, distribution and delivery models are focused on solving problems for mid-market companies and divisions of Fortune 500 Corporations.

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