



For Building Products Companies

A UNIFIED WEB BASED SOLUTION THAT FUELS GROWTH



Why A Building Product Company Should Utilize ExSellece

- Improve Execution and Results of Marketing Campaigns
- Increase Sales Productivity with a Comprehensive Knowledge base of Project and Contact Information
- Offer Better Service and Expand Relationships
- Create a Proactive Sales Team
- Improve the Efficiency and Effectiveness of the Selling / Bidding / Quoting Process
- Simplify Document Handling and Retention
- Simplify and Improve Management of Field Expenses
- Manage and Monitor Improvement Initiatives
- Enforce Best Sales and Marketing Practices
- Obtain both Individual and Enterprise Wide Real-time Information and Metrics
- Utilize Flexible Workflow, Agents and Security to Easily Adapt the System to Effectively Support New and Improving Processes
- Identify More Projects, Get Specified More Often, Issue More Quotes and Close More Business

ExSellece Delivers Sales Productivity for the Building Products Company

The building products sales cycles are long, complicated and require timely interactions with architects, property owners and contractors. While in the opinion of sales reps, most CRM systems add administrative burden, ExSellece contains a robust set of functions that increase the productivity of the sales person while at the same time improve marketing and management. ExSellece assists in all phases of the building product supplier's sales process. First it insures the latest information regarding construction projects is in the hands of the right people at the right time. When it is time to bid, ExSellece generates quotations efficiently and effectively in accordance with the companies pricing and approval guidelines. Besides the benefits derived from Project Leads Management and Automated Quoting; Campaign Management, Contact Management, Workflow, Opportunity Management, Expense Reporting, Document Management and Business Analytics features combine to further bolster sales and marketing results. ExSellece's powerful combination of functions helps insure a sufficient number of projects are flowing into the sales funnel and the proper activities are taking place to meet revenue targets.

Proj Name	Proj Type	Name	City	Est. Price	Est. Price	My Auth. Price (Percent)	Cost	Break out	Sort Order
10	SA	USA - SP	San Francisco	\$198,000	\$198,000	100.00%	\$198,000	\$0.00	LOL
11	SA	USA - SP	San Francisco	\$42,211	\$42,211	100.00%	\$42,211	\$0.00	LOL
12	SA	USA - SP	San Francisco	\$21,719	\$21,719	100.00%	\$21,719	\$0.00	LOL
13	SA	USA - SP	San Francisco	\$42,211	\$42,211	100.00%	\$42,211	\$0.00	LOL
14	SA	USA - SP	San Francisco	\$21,719	\$21,719	100.00%	\$21,719	\$0.00	LOL
15	SA	USA - SP	San Francisco	\$42,211	\$42,211	100.00%	\$42,211	\$0.00	LOL
16	SA	USA - SP	San Francisco	\$21,719	\$21,719	100.00%	\$21,719	\$0.00	LOL
17	SA	USA - SP	San Francisco	\$42,211	\$42,211	100.00%	\$42,211	\$0.00	LOL
18	SA	USA - SP	San Francisco	\$21,719	\$21,719	100.00%	\$21,719	\$0.00	LOL
19	SA	USA - SP	San Francisco	\$42,211	\$42,211	100.00%	\$42,211	\$0.00	LOL
20	SA	USA - SP	San Francisco	\$21,719	\$21,719	100.00%	\$21,719	\$0.00	LOL
Total				\$447,719	\$447,719	100.00%	\$447,719	\$0.00	

Campaign, Contact and Opportunity Management Drive Results

ExSellece features increase productivity in the execution of marketing campaigns to architects or contractors. Unification of the marketing and sales functions allow an organization to understand the results of campaigns and to adjust future strategies to capitalize on successful initiatives while discontinuing less effective activities.

ExSellece includes a fully functional electronic calendar that associates appointments, tasks, and bid dates with companies, individuals and projects. It integrates with, but does not require, Microsoft Outlook to operate. Its group scheduling and abilities to handle recurring events, combined with its capability to notify when assignments have been made or tasks are slipping, ranks ExSellece among the best calendaring systems.

ExSellece sales automation is predicated on the premise that for a building products supplier to meet its sales objectives, its

More Projects are Identified, Products Specified, Quotations Issued and Business Closed

sales team must execute a disciplined sales process. ExSelligence provides a proven sales process framework which can be easily adapted to incorporate the requirements of different companies or leading sales methodologies. All the capabilities come together to keep the sales person focusing on the right prospective projects and communicating at the appropriate time with all the “key players” including the architects, owners and contractors. ExSelligence captures all interactions with companies and contacts. They then become part of the knowledge base available to assist in future sale efforts. Automatic alerting, e-mail integration, mail merge, and workflow combine to help the representative be proactive rather than reactive as they build relationships and close business.

Project Information is Available when Needed to Insure Products are Specified and Bids Selected

Optima has added unique capabilities for our building products clients to better track and close potential projects in their markets. By importing F.W. Dodge or Reed Construction information into ExSelligence, Optima facilitates the timely delivery of project leads to field personnel. Both sales reps and managers can easily flag hot prospects and track them through the specifications, bidding and construction process. Knowing when and where projects are being planned is imperative. Arming the sales force with ExSelligence can mean winning the deal before the competitor is even aware of the project. With entire sales teams on instant notice for hot opportunities, the likelihood of business success is increased.

Outside project leads are merged with projects uncovered by the company’s representatives. Information added by the reps during the sales process is combined with regular updates on projects from the customers chosen source for construction information. The rep is always out in front of competition, whether it is getting included in the specifications or getting selected as the winning bidder.

Efficiently and Effectively Quoting and Closing Business

ExSelligence contains functions to improve the efficiency and effectiveness of the quoting process. The sales team can generate quotes, assemble submittal packages, configure products, gain approval for special pricing and stay alerted to progress all with the assistance of ExSelligence. Margins are maintained, deals do not “slip through the cracks”, and responsiveness to prospects and dealers is improved. Optima’s technology and expertise combine to deliver a quoting and product configuration system rapidly and economically. Most importantly it supports a company’s sales process and pricing guidelines specifically. The result: improvement in the companies bottom line.

Business Analytics Increase Understanding and Foster Continuing Improvements

The ability to analyze all sales, client and project information collectively facilitates management’s understanding of the business’ operating performance, adherence to best practices and compliance enforcement. ExSelligence analytics, data monitoring and alerting, workflow agents and improvement initiative management features work in conjunction with data from all ExSelligence components, as well as data from other disparate systems a client utilizes. This availability of real time data and automatic notifications improve service and make personnel proactive rather than reactive. Key performance indicators can be included for monitoring marketing, sales, service, project

and financial results. Multiple graphs, lists, velocity dials, tasks, appointments, and other pertinent information combine in personalized portal pages and dashboards to increase understanding and improve service and results.

When opportunities for improvement arise, often initiatives are launched and people are assigned responsibilities in the quest of reaching goals and targets. Pressing day to day issues often cause employees to unknowingly defer tasks that make up key elements of such initiatives. Management follow up is difficult and frequently lacking and planned results become left to chance. ExSelligence addresses these issues. Tasks associated with improvement initiatives are assigned and automatic notification is delivered to appropriate personnel when the tasks are past due and completed. The initiative at a glance view gives team members a comprehensive view of the initiative. ExSelligence provides an added degree of control over the business and a key contributing factor to its continuing improvement.

Document Management and Expense Reporting Tools Generate Savings

ExSelligence document management capabilities support a firm’s efforts to reduce the costly flow and duplication of paper across the enterprise. Reports, forms, collateral, presentations, specifications, proposals, quotations and any other type of document can be stored, electronically reviewed and when necessary, printed. Retrieval of documents is typically a “click” away for the ExSelligence user. Document management is both efficient and a standard function within an ExSelligence system.

The Expense Reporting component of ExSelligence provides anywhere, anytime capture of expenses for field personnel and the potential to accelerate payments to employees. It provides timely visibility of expenses across the organization. Expense data is easily associated with customers, vendors, projects or sales opportunities. Analytical functions assist in better control of expenses and justify discounts from frequently used vendors. The results are simpler expense reporting and reduced costs.

Security and Workflow Agents Simplify the Adoption to New Processes

ExSelligence Security and Workflow Agents adapt “out of the box” capabilities to the specific demands of an individual company’s current or evolving business processes. The underlying technology framework includes security, information flow, workflow and business process agents. It includes administrative tools which, with training, can be applied by a company to modify security, create custom workflow to support improvements in the company’s business processes, reduce administrative burden, improve efficiencies and both extend benefits and longevity of the system. It allows the application and enforcement of best practices across the organization, thereby improving results without increasing systems investment.

Deploy Industry Leading System Capabilities Rapidly Without “Mega” Investment

The system deployment takes place in a timely fashion on a predetermined and agreed to fixed price. The cost of an Optima solution is understood before deciding to proceed and typically is lower than competing alternatives. On time, on budget implementations are the norm for Optima clients. ExSelligence’s combination of low cost and robust functionality, adapted to the specific processes of the client, are unique in the industry and insure high returns on systems investment.

Call Optima Today at 800 821-7355 or Visit Optima-tech.com