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Novatech Achieves Greater Efficiency Through quote iQ's CPQ Process

NOVATECH

BRING EVERYTHING UP TO SPEED



Based in Nashville, Novatech is a leading IT and print technology provider that serves many outside its native footprint of the southeastern United States. The mega dealer, with more than \$100 million in annual revenue, had strong desire to improve efficiency and consistency in its sales quoting process. With teams in numerous regional markets, the company needed a modern configure-price-quote (CPQ) solution for faster quote generation. Beyond that, the tool had to integrate seamlessly with its customer relationship management (CRM) system.

Before implementing Keypoint Intelligence's quote iQ, Novatech relied on a legacy solution that sales representatives regularly reported was difficult, slow, and cumbersome. As you can imagine, this made it challenging to produce quotes in a timely manner. Any delays not only frustrated sales reps but reduced the time they had for interacting with customers and prospects, too. Leadership also recognized the need for more consistent proposals across its regional markets, along with better oversight of the quotes being delivered to customers.

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Dakota Ford,
Business Intelligence Manager at
Novatech

After evaluating available options, Novatech selected quote iQ because it addressed several organizational priorities. The most important? Speed. Configuring products and generating quotes quickly and accurately, with no delay, was a must. Another key: Linking proposals directly to the quotes created by sales reps to ensure that a proposal presented to customers reflected the configuration and pricing approved internally. The company also wanted a structured approval process so that every quote would be reviewed by a market point person before being sent to a customer.

quote iQ offered flexibility in a smart platform tailored to software and print providers.

The Keypoint solution was integrated with Salesforce, Novatech's CRM platform. Although the full transition took several months, the similarities between the previous environment and Salesforce helped simplify the migration process. The connection created a unified environment, allowing the company's sales team to manage customer data, opportunities, and quotes within a single platform. No surprise, visibility into the sales pipeline and streamlined operational workflow ensued. Quote development time was greatly reduced, freeing up reps to spend more time prospecting.

Consistency is critical, and quote iQ has enabled Novatech to standardize proposals across regional

markets. Templates ensure each customer receives a professional document regardless of location. Aside from fewer headaches, consistency has strengthened the company's brand while maintaining internal guidelines and expectations.

Transparency is of high importance, and here, Novatech has appreciated quote iQ's ability to visually present configured equipment within proposals. Sales reps can show clients images of a device exactly as it is configured in the quote, which provides a clearer picture of the equipment. This visual element is a powerful tool, enabling reps to communicate value more effectively and support conversations during the closing stage of a deal.

Novatech leaders describe the experience of working with Keypoint Intelligence as highly collaborative and responsive. The Keypoint team actively listens to customer feedback and incorporates it into ongoing product development, ensuring that the platform continues to evolve in ways that benefit dealers across the industry.

Today, quote iQ plays a critical role in Novatech's sales operations. By reducing creation time, standardizing proposals, and improving customer engagement, the platform has helped the company modernize its process and empower its sales teams. For Novatech, the implementation represents not just a technology upgrade but a strategic investment in tools that help sales reps focus on what matters most.

Building relationships with customers and closing deals.

