

# ShareMethods Case Studies

## Sales Case Study



### Problem

JMJ Associates provides consulting services to multinational companies for large-scale capital investment and construction projects. Despite using Salesforce to help automate its own sales processes, JMJ Associates still found itself operating manually whenever it created a custom proposal for a customer — which was often. JMJ tailors its services to help clients to reach their goals and each proposal is one-of-a-kind. Consequently, each proposal must be reviewed and edited by many subject matter experts located at various locations globally and approved by regional managers in JMJ operations and finance before it is ready for submittal to the customer. The company's manual process involved a lot of duplication and sometimes chaotic paper handling in generating a custom proposal. As one regional sales manager, Robert Allbright put it, *"It worked but you got 30 emails to look through on a light day and maybe 100 on a heavy day."* More importantly, he went on, *"You might get into a document and not easily discern who else had reviewed it, if this was the most recent version or find that changes were made but the 'MS Word track changes' functionality had not been utilized by some reviewers, which created significant confusion and delays."*

### Solution

To streamline and rationalize the process, JMJ wanted a document management system with the capability of integrating with its on demand CRM so that the company could easily access all sales information during the creation and approval process and to give the company a common and easily accessible repository of proposal documents by users anywhere in the world. JMJ found what it was looking for in ShareMethods, a company that is part of the Salesforce.com partner ecosystem.

When the initial proposal draft is uploaded to ShareMethods all the people involved in the approval process get an alert that there's a document in the ShareMethods inbox. Each team member then reviews and approves documents following a specific sequence. According to Allbright, *"Using ShareMethods has really streamlined and taken the confusion out of our proposal review process. It's saved us a tremendous amount of inefficiency in terms of duplication of effort and rewrites."*

***"Without this process,  
we would have needed  
another person."***

*- Robert Allbright, Regional  
Sales Manager, JMJ  
Associates*

### Results

The ShareMethods-Salesforce integrated solution enabled JMJ's Americas Region to not only to sell more consulting days but to close more high-value consulting projects. As a private company, JMJ does not share its financials with the public so actual revenue numbers are not available. Nevertheless, Allbright said that JMJ's Americas region sold about 20% more consulting engagements in 2005 as it did in 2004, and the total value of the transactions was up by almost 27%, a huge productivity boost for the company. Allbright also recognizes the efficiency gains provided by this solution, *"Without this process, we would have needed another person."* So it's clear that JMJ has increased revenues and saved money using this solution.

JMJ has recently progressed to using ShareMethods latest application "ShareOffice". With ShareOffice the proposals can be automatically generated based on templates and data from Salesforce, eliminating the slow and tedious task of writing proposals. Allbright concludes that *"The end result has been a reduction in proposal issuance time of 30 percent to 50 percent, and elimination of a lot of stress on the people involved in the proposal generation process."*



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## Marketing Case Study

### Problem

As with many companies, the marketing group of a New York based media company works hard to support their company's sales staff. As part of that work, they develop materials that the salespeople can use that hopefully help them close sales. Marketing understands the competitive landscape, the market dynamics, and the company's products or services. This information can be invaluable to the salespeople as they work to sell the company's products. Frequently, however, there was no way for the salespeople to easily find the latest and most relevant materials that marketing has created. The marketers, for their part, had no way of knowing if the salespeople were using the materials, or how effective they were. Also, the materials were spread out across many disparate systems such as file servers, personal laptops, the corporate website, and sales intranets. Looking for information not only took away selling time for sales people looking for information (and increasing their frustration), but also all of these systems needed to be supported, maintained, and synchronized. Also, marketing had no visibility into what is being used and how it is being used.

### Solution

By using the ShareMethods external service with features designed specially for marketing and sales, the company's marketing group was able to quickly set up a central library where materials are easy to find, and usage tracked. New materials can be put through approval or review workflows to efficiently manage the quality control process, resulting in higher quality material. A critical requirement for the sales group was that the central library is integrated with their salesforce.com CRM system. ShareMethods seamless integration with salesforce.com allows the salespeople to easily find the latest document without leaving their CRM system.

The ShareMethods library allows for the latest version (and previous versions, if required) of data sheets, graphics, templates, and brochures to be easily found for reference or reuse. This approach can dramatically reduce the amount of needless re-work that is seen in companies where, for example, marketers have graphic files re-commissioned for creation by a graphic design house as the original versions can no longer be found.

The ShareMethods sales and marketing library also has important benefits for branding. The marketing department spends substantial time and money refining and evolving the companies' branding image. To fulfill this strategy, it is critical that sales use the latest materials. It is difficult to quantify the value enhancements and brand equity gains that result from a wider and more controlled usage of an organization's branding collateral in the pursuit of sales and strategic initiatives, but most sales and marketing organizations would agree that the value is significant.

### Results

The ShareMethods client found that by using ShareMethods, marketers can now see if and how materials are being used. They also get feedback on files so they can improve them and make them more effective.

Cost reductions include the savings related to centralized access for sales and marketing information. Estimates are that two to four hours per week of a sales staff member's time, which is typically wasted on searching for sales and marketing information, was saved through the use of the on-demand library. This class of cost savings equate to roughly 5% to 10% of an employee's time, where the time savings can translate into cost savings of \$2,500 to \$10,000 per staff member annually. The cost savings for staff time can be applied through more productive use of existing staff or via headcount adjustments or both approaches. Likewise sales and marketing materials which have already been created do not need to be re-created or duplicated. This can result in significant cost savings – just one photo shoot can run into the tens of thousands of dollars; multiply this across many sales and marketing materials which no longer are needlessly recreated and the savings can go into the hundreds of thousands of dollars.

## Partner Manager Case Study



### Problem

Evolution Benefits, Inc., a rapidly growing company, powers the benefit programs of more than 80 managed care and administrative services organizations using a prepaid benefits card. As they were growing, they experienced difficulty sharing member educational materials with their third-party administrator partners in a scalable way. They were relying on a server to allow customers to obtain sales and marketing materials, using file names that gave them little help finding what they wanted. *"Each reseller had to give us an IP address first to set them up,"* said Jimnahs Herron, manager of marketing and sales support at Evolution Benefits. *"It was just file names on a server, with no corporate branding and a gross user interface. People couldn't get access to the materials. It was a real nightmare."*

Evolution Benefits needed a system that was accessible by internal departments, such as sales, marketing, and product development, as well as external partners, such as channel sales, distributors, and resellers. They already knew their partners had a tough time finding materials in a FTP or extranet. In addition, there existed no version control to track document changes; there was no reporting capabilities to see which documents have been read by whom, and partners had no way of knowing when a document had been updated, or when new materials were created.

### Solution

Evolution Benefits found ShareMethods' application "ShareNow for AppExchange" to provide advanced communication tools for their own sales and marketing staff, as well as external clients, such as their third-party administrator partners. *"It was like a 'Eureka!' light bulb moment for me. Now, all of our partners log in [to the portal], and they download what they need",* Herron said. ShareMethods gives the partner marketing group, the ability to:

- Easily set up secure password protected accounts for partners;
- Set up access controls to provide granular control of who sees which material, so partners only see the material that is relevant to them;
- With analytics and reporting, see which partners are accessing which documents and when;
- Have complete version control and history of all documents;
- Have collaborative tools such as approval and review workflows to collect valuable feedback on materials.

***"Since ShareNow is fully integrated with Salesforce it has been easy for us to extend our salesforce.com solution with new capabilities for advanced document management, collaboration, and partner communications."***  
- Jimnahs Herron, Sales and Marketing Manager, Evolution Benefits

*"Since ShareNow is fully integrated with Salesforce it has been easy for us to extend our salesforce.com solution with new capabilities for advanced document management, collaboration, and partner communications. ShareNow solves a number of our key business challenges for the management and distribution of sales and marketing content, and we are delighted with the results,"* said Jimnahs Herron.

### Results

With ShareNow for AppExchange, sales, marketing, support, and external partners can be on the same page for brand messaging and best practices, with a broad library of sales and marketing content easily accessible to the extended enterprise. *"We started with a deployment of ShareNow for AppExchange for our internal sales and marketing team. That deployment brought quick value for effective sharing of best practices and key documents within the company. As a next step, we rapidly expanded our usage of ShareNow to more than 90 of our key business partners across the country, and they too are now*

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*experiencing the value of documents on-demand via ShareNow. Once we engage new clients, ShareMethods Marketing Training is now part of our Best Practices. We can't imagine supporting our client base with the educational materials they need without ShareNow,"* said Jimnahs Herron.

About 125 health care benefits administrators have begun offering the Evolution Benefits prepaid benefits card to their customers. By using ShareNow, the health care administration companies can access the Evolution Benefits sales brochures and educational materials for their members whenever they are needed, instead of having to request e-mailed documents. *"For a company like ours, the whole on-demand [availability] part of this has been a great differentiator" for us compared to competitors, Herron said. "Without adding people or hardware, ShareNow is helping us [handle] our new projected growth."*

## IT Manager Case Study

### Problem

The IT management of a security hardware provider faced challenges supporting their business users' need for a collaborative document management, knowledge management system, and extranet. Frequently IT personnel are burdened with the development and maintenance of such systems. They have to make sure there is sufficient storage, that it is always available, and are frequently asked to update it with new functionality. Another problem is that the volume of emails can burden their email servers as users email documents from the knowledge management system to each other.

### Solution

Instead of building a document management and collaboration system in house, the company turned to an outside provider – ShareMethods. ShareMethods was brought in, first as part of a six month pilot, then using a phased deployment and rollout strategy. ShareMethods was used to support the launch of a new product line by supporting the secure distribution of new product information quickly to new and existing partners. Now hundreds of users in the US, Europe, and Asia – including internal teams at the company and external business partners – are using ShareMethods to provide rapid and easy global access to business critical sales, product information, and marketing materials.

Since ShareMethods is hosted externally, the system could be set up quickly with no expenditures on hardware, no installation and configuration of software, and no burden on IT resources. ShareMethods can be configured and provisioned by the sales or marketing business owners, which means no lengthy requirements analysis and implementation (and often re-implementation). By using ShareMethods, IT staff can deploy a system quickly, let the business owners manage it, and the IT staff can focus on more important tasks. Also, ShareMethods' user-friendly application service allows partners to quickly find material. *"ShareMethods allows our partners to have an interface that [they] have commented is beneficial due to the descriptions in the categories and files"* says the company's application engineer.

**"I think [ShareMethods] is a great tool for document distribution to all partners."**  
- Partner Integration Manager

### Results

ShareMethods met the key requirements of the customer by providing a platform that securely stores and distributes sensitive material to partners – without burdening IT. *"The biggest advantage of this tool is there is no development time or impact on our marketing/IT department schedule"* says the ShareMethods customer's partner integration manager. ShareMethods saves ShareMethods customer the expenses of ongoing software and hardware upgrades, IT staff expenses, and the cost of monitoring and ensuring 99.9% availability.



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The ShareMethods customer experienced benefits beyond the IT cost savings. They also saw an increase in productivity of the product marketing group by using ShareMethods. *"[ShareMethods] decreased the time I spend emailing new documents out to our existing partners"* says the company's application engineer. The time spent distributing content for each partner was cut from 30 minutes down to just 5 minutes. The staff also benefits by the reduction in requests for information that used to frequently come in from the partners, which allows the staff to focus on more important tasks. The product marketing staff has the infrastructure in place to effectively support their growing set of reseller partners – now and in the future.

### About ShareMethods

ShareMethods combines advanced document management, collaboration, and CRM integration into powerful on-demand solutions. The ShareMethods applications help sales, marketing, and support teams create, manage, and share documents easily and securely. ShareMethods also helps organizations communicate more effectively with members of extended selling networks such as distributors and dealers.

ShareMethods provides a very cost-effective alternative to developing and supporting a sales and marketing intranet or extranet. The "sales and marketing portal in a box" approach can cost less than one tenth of the price of traditional enterprise software. ShareMethods received an "Excellent" rating for usability from eWeek and scored 9 out of 10 for "Ease of Use, Implementation, and Value" from InfoWorld. The company was recognized together with salesforce.com in the InfoWorld Top 100 for one of the Best IT Projects of 2004 and as one of the CRM WizKids for 2006 by noted CRM analyst Denis Pombriant.

ShareMethods provides on-demand services to more than 200 companies on a global basis, with users in 32 countries and customers including BusinessWeek (a division of McGraw-Hill Companies), CNET Channel (a division of CNET Networks), Agile Software, Inc. (a division of Oracle), salesforce.com, HID Corp., TI Broadcast Solutions Group, Evolution Benefits, and others. For more information visit <http://www.sharemethods.com> or call 1-877-SHARENOW in the USA.



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