



## Streamlining Presales Operations with Netformx® DesignXpert™



### Overview

IPLogic's network design and quoting process involved multiple steps and tools, and redundant tasks, often taking up to three weeks to close a large deal. After deploying DesignXpert™ by Netformx, IPLogic was able to integrate multiple tasks into a single tool. This dramatically increased IPLogic's efficiency and reduced design turnaround time to between two and three days or less, while increasing the professionalism of their deliverables and minimizing oversights and mistakes.

### Challenges

- Multiple Segregated Tools
- Multiple Customer Meetings
- Time-Consuming Manual Process
- Redundant Tasks
- Hand-Drawn Diagrams
- Resource Availability
- Inefficient Vendor Tools

### Business Results

- 33% Reduction in Opportunity-to-Quote Time
- 60% Reduction in Quote Preparation Time
- 90% Reduction in Presales Administrative Investment Time
- 90% Reduction in VoIP Bill of Material (BoM) Configuration Time
- 99% Reduction in Design Errors
- Able to Do More With the Same or Fewer Resources

***“With the same amount of resources, we now handle many more opportunities in the same time frame using DesignXpert.”***

— Chris Gaito, Vice President, Professional Services, IPLogic

### Lengthy Presales Process

Prior to using DesignXpert, IPLogic had a lengthy presales process that involved multiple customer meetings and using multiple design and quoting tools.

“We would meet with the customer and take a great deal of time to document the network,” said Chris Agnoli, Consulting Engineer at IPLogic.

Following each customer meeting, the IPLogic team would return to the office, design the solution on paper, and then log into the online configurator to create the quote. Often the original design was actually hand-drawn on a large sheet of paper, because Visio was too time consuming, according to Agnoli.

“The time it takes to find stencils on Google that match the components in the network in order to create an accurate drawing, just isn't worth the time to draw it out in Visio,” Agnoli explained. “I can draw the design more quickly on a piece of paper.” In addition to potential damage and lack of an audit trail, the customer deliverable was not at the level of professionalism that IPLogic and its customers demand.

When a consulting engineer reviewed the output from the configurator, too

often the project design was not clear. Therefore, the engineer would have to contact the salesperson and/or design engineer for further clarification about the scope of the opportunity and how the design and configuration meets the customer's objective. Once all the part numbers were entered into the online configurator, a customer quote still needed to be generated. To do this the BOM had to be exported to an Excel spreadsheet and emailed to the internal salesperson. The salesperson then created a quote, part number by part number, painstakingly using the company's internal quoting system. Only after everyone agreed, was it deemed worth the effort to store the design in a Visio diagram.

“It was very time consuming; a lot of circling back with multiple phone calls,” Agnoli recalled. “We spent much of our time duplicating efforts, creating a design on paper, then in Visio, then in the configurator — a very cumbersome, drawn-out process.”

When complete, IPLogic would deliver the design to the customer, who in most cases would request changes. This launched a repeat of the same processes — and occasionally there would be multiple rounds until the

## ABOUT IPLogic

IPLogic, Inc. delivers converged voice, data, and multimedia solutions that increase revenue, decrease cost, and maximize organizational productivity for clients. Serving medium to large organizations across the states of New York, Vermont, Massachusetts, Pennsylvania, and West Virginia, IPLogic expertise includes voice and unified communications through traditional PBX and converged IP telephony and multimedia communications, network security, network infrastructure (LAN/WAN), mobility and wireless network solutions, multimedia solutions, managed IT and network services, and training and IT staff augmentation solutions. We empower clients to Connect, Communicate, and Compete — Better.™ For more information visit [www.iplogic.com](http://www.iplogic.com)

## ABOUT Netformx

*One solution, one repository, one integrated process*

Netformx provides the world's most advanced network design and proposal generation software platform that significantly streamlines any network design, increases productivity, identifies additional revenue opportunities and promotes greater customer satisfaction within a fully integrated, highly collaborative environment. DesignXpert helps you and your customer establish a validated network "blueprint" that becomes a reliable reference source for managing the evolving lifecycle of their network — making you a "trusted advisor" and not "just another vendor" to your customer. More information can be found on the Web at [www.netformx.com](http://www.netformx.com)



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## "The time savings is unbelievable."

customer accepted the design. The team sorted through the quote to locate the deleted part numbers and add the new ones, while continually double-checking the impact of these changes on the overall design. At this rate, designing large-scale networks could take as long as three weeks.

"The biggest challenge was resource availability," said Chris Gaito, Vice President of Professional Services at IPLogic. "Since it is difficult to find qualified people, we had to find new ways to be more efficient with current resources to achieve our planned revenue growth."

### Integrated Design and Quoting

"We looked at tools for quoting, design and other various pieces of the process, but we did not find any solution, other than DesignXpert, that successfully integrates all the necessary components into a single easy to use tool," explained Gaito, who deployed DesignXpert across his entire team. Now every solution is designed and quoted using DesignXpert.

According to Gaito, using one integrated tool — DesignXpert — helps him drive process and workflow, establish new standards, and minimize training and licensing.

### Netformx DesignXpert delivers the following business results for IPLogic:

#### ■ Time Savings:

"DesignXpert allows us to realize some very significant operational efficiencies, minimizing the IPLogic sales cycle," said Agnoli. "The time savings is unbelievable. With DesignXpert, all that time has been reclaimed by the company."

By using DesignXpert, IPLogic has reduced person-hours required to prepare a quote by 60%, and has reduced opportunity-to-quote time from as much as nine days down to

two to three days or less. Agnoli also pointed out that DesignXpert has reduced VoIP BoM configuration time by up to 90%, from 40 minutes down to just four minutes.

#### ■ Maximized Resources:

"With the same amount of resources, we are able to cover a lot more opportunities in the same time frame using DesignXpert," said Gaito.

"Fewer engineers are used to handle more presales opportunities in a more thorough manner, which has benefited us," added Agnoli. "We need to keep our resources billable. However, presales activity, while critical, is not billable. To reduce several days of presales design effort to one day — that's time the engineer can be on site doing installations and generating revenue."

#### ■ Reduced Errors:

A manual process means more data entry and more potential for typos and other errors. By automating processes, DesignXpert enables IPLogic to eliminate human error. In fact, users have said that since using DesignXpert, they experience an error rate of less than 1%.

### The Bottom Line: Enhancing Team Productivity

"Previously we had to be online to use the network design, configuration and quoting tools," Gaito concluded. "Using the old methodology, it took anywhere from 12-20 hours per project, and all that time had to be online. With DesignXpert, engineers now spend from 30-60 minutes doing the same work and a majority of that time can be offline. Therefore, I have engineers who can be productive working on trains or planes or in other environments where they do not have network connectivity. I have opened up a whole new working hour by having the right automated tool."