

## SUCCESS STORY

### DocuWare Harnesses ConnectAndSell's Lightning to Increase Conversations with Prospects

When DocuWare's Global Chief Operating Officer Timothy Sutter was asked which dialing system his sales team had used in the past, he jokingly replied, "The finger. Yes, we were as old school as you can get."

With a goal of 14 conversations per week per rep, Tim saw his team members struggling to get eight to ten conversations each. "We could have moved up to a system that just provided automatic dialing," Tim explained, "but I decided to take the better step



Timothy Sutter  
COO, DocuWare

up, to ConnectAndSell®. They offer a cloud-based service and technology called Lightning™ that uses a global network of trained agents to deliver prospects on the phone to my sales team within minutes after a rep hits the 'Go' button on the ConnectAndSell screen. My reps now spend their time having conversations with prospective customers instead of circumventing

gatekeepers, interacting with voice response systems, navigating phone trees, or leaving voicemail messages."

With 25 years of experience in finance and document management backing him, Tim is responsible for marketing, sales, and customer success at DocuWare. Founded in 1988, DocuWare provides the world's leading technology for digital archiving, as well as Enterprise Content Management services that protect critical documents from loss, damage, and prying eyes, and deliver the safest solution for managing and

archiving documents and information across organizations.

To pilot the ConnectAndSell integration with DocuWare's sales strategy, Tim selected a team of eight of his field sales reps, about 20% of the company's sales force. Leading the team is Brian Hager, Vice President of Major Accounts at DocuWare. Brian's career spans 25 years and focused on delivering high-value, high-return enterprise software solutions to global organizations. His team's goal at DocuWare is to have discovery conversations and set meetings with decision makers at businesses of 500 employees or larger.

"We define a conversation as one in which the prospect acknowledges they have pain about document management and storage," Tim explained. "Using ConnectAndSell, we've had weeks now where one of our reps has done 63 conversations in a week, where the goal is 14. So it's really filled up the top of the funnel."

"That's a 4.5x improvement," noted Chris Beall, CEO of ConnectAndSell. "We don't often see that big a jump in the short time [four months] that the pilot had been running at DocuWare."

When asked whether there was any pushback from the DocuWare sales reps during their initial use of ConnectAndSell, Tim reported, "They're used to warm introductions. With ConnectAndSell, these are truly cold calls. You have to be a competitor to want to do this. So you've got to hire into that profile of people who want to compete, who want to win that conversation."

Tim continued, “In this way, ConnectAndSell has enabled us to hire more effectively.”

Brian said that some of his reps needed a little assistance discovering the benefits that this new way of calling offered them. “The first challenge was helping them understand the value of the people that ConnectAndSell delivered to them. The idea that someone from an organization that we care about gets on the phone and really isn’t looking for *us*, but we’re looking to learn about *them*, was one of the hardest obstacles for my team to overcome.”

So, a little job description adjustment was needed. Brian said, “They now know that their job is to establish a relationship and insight into the organization that would help create a problem-solving and buying vision.” As with most change, though, there was resistance from some team members.



Brian Hager  
VP, Major Accounts  
DocuWare

Chris warns his customers that ConnectAndSell amplifies “suck,” the parts of the sales process — and the reps — that aren’t working effectively or efficiently. Brian admitted with a laugh, “We’ve come across various types of suck. When we have our sales teams engage and try to sell on that [initial] phone call, it’s a disaster. We had to teach them to actually build a relationship rather than sell. And we discovered that some people can’t adopt this new practice. It’s just not in that person’s skill set. In a second round of hiring now, I’m using a profile that fits better with the ConnectAndSell strategy, meaning you’ve got to be intellectually curious, you’ve got to enjoy learning about organizations, you’ve got to enjoy talking to people, you have to be very natural at leading a conversation and extracting the information. And,” he added with another laugh, “you need to enjoy doing that 100 times a week.”

Both Tim and Brian acknowledged the excellent assistance that their team has received from ConnectAndSell and the one-on-one coaching from Customer Success Manager, Mike McAra. Brian commented, “We get really good help and support, good turnaround time, good ideas, good experience, cross references to other clients that they have. It’s all been extremely, extremely valuable.”

“What’s also been really valuable to us is the reporting,” Tim stated. Reporting is a feature of Lightning that provides up-to-the-minute statistics on dialing and conversation outcomes. Tim continued, “Our ability to go in and listen to conversations any time, day or night, whenever Brian or I have free time, and being able to report on what exactly the outcomes are, is so important at the top of the funnel.” In addition, Mike has a weekly meeting with Tim to go over the reports, which have been customized to meet Tim’s management and coaching needs.

The call-recording feature has been a big help in coaching reps too, Brian stated. “I’ve asked the team to share their good and bad recorded conversations with each other. And then together we’ve had conversations about those successes and failures and how to be better. It’s invaluable as a learning tool.”

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— Tim Sutter, COO

Chris commented on how quickly DocuWare is achieving solid results: “Their reps were struggling to get 14 conversations per week; now 65 conversations per week – a 4.6x improvement – are routine. And in the first 90 days they have improved their conversion of conversations to meetings by 1.8x. DocuWare is a leader among all our customers in using the ConnectAndSell solution to drive measurable, sustainable improvement in combined efficiency and effectiveness.”

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—Brian Hager, VP, Major Accounts

Chris continued, “One of the most effective uses of ConnectAndSell’s sales acceleration technology is to expand efficiently into the SMB market segment. DocuWare is a leader among ConnectAndSell customers in using our technology effectively to execute an SMB market expansion strategy – mostly because their senior leadership has taken a true hands-on approach to getting the most out of each conversation we deliver.”

Mike agreed with Chris. “I think the one key to success that separates DocuWare from the other 49 ConnectAndSell accounts I have is Tim’s engagement. It’s a pretty rare thing to be able to call the COO on his cell phone and really talk shop on sales. It’s leading from in front.”

What is the future plan for building on DocuWare’s success with ConnectAndSell? The team is getting ready to make follow-up calls to prospects who expressed interest but were not in the right phase of their company’s buying cycle when DocuWare reps first called them.

Brian explained this next step: “Follow-up strategy is essential. If you use ConnectAndSell over a period of time, you’re going to end up with 10,000 entry points at some time in the future. You’ve identified a customer, you’ve got a brand, you’ve got awareness, and you’ve learned something about them. Now, if you don’t do something with it, it just disappears, and all that work you did in the past is useless.”

Summing up DocuWare’s experience with ConnectAndSell, Brian said, “At the end of the day, the goal is pipeline development, and ConnectAndSell gives us a way to consistently solve the hard challenge of engaging with the marketplace when the marketplace isn’t engaging with us first. It’s awesome in that aspect.”

Tim touted the addition of ConnectAndSell to DocuWare’s sales strategy. “What’s important to me is that ConnectAndSell is part of our ecosystem now. It has become the backbone of what we’re doing.”

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