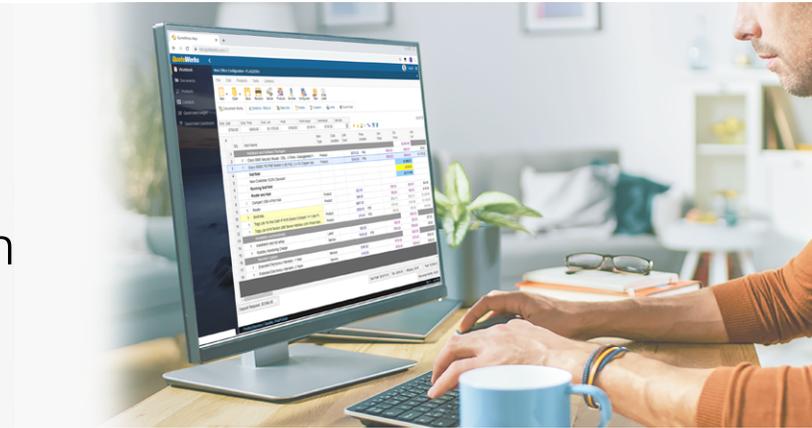


## Faster Quotes Improve the Bottom Line for Techevolution



### Overview



#### Client

Techevolution is an MSP with its own data center, allowing them to couple cloud and managed services solutions.



#### Challenge

Quoting was taking too long at more than an hour per quote, and only about 50% of their quotes were getting approved.



#### Solution

With QuoteWerks, quoting takes only five minutes. Since they can get quotes into the hands of customers faster, about 99% of quotes are approved.



#### Results

QuoteWerks makes quoting more efficient and increases Techevolution's revenue.



When the quoting process was taking too long, Techevolution found that their customers were starting to look elsewhere. Customers want their quotes quickly so they can sign off, complete their order, and move on to other work. With their manual quoting process taking more than an hour, Techevolution knew something had to change.

Techevolution is a managed service provider (MSP) that has been in business for over 21 years. One thing that makes Techevolution unique is that they run their own data center. This allows them to couple cloud solutions with their managed service solutions and enables them to get granular with services to offer their customers a great value. It also helps Techevolution to provide additional protective services their customers might not usually get from a regular MSP.

### A Miserable Manual Quoting Process

When Techevolution first looked at QuoteWerks, they were quoting projects in a time-consuming way using Excel spreadsheets. Each quote took at least an hour to an hour and a half to create.

The slow process was affecting morale as well. Every time Techevolution needed a quote, they thought of it as, "Here we go again, we have to waste an hour to do a quote." This wasn't so bad if they landed the deal. However, if they didn't, they just wasted valuable time.

Because it took so long to create a quote, by the time the customer got it hours later, it was often no longer a priority. At the time, their approval rate was about 50%.

# QuoteWerks Features



Quick and Easy



Seamless Integration



*When I do a quote, I actually get excited because I know it's something that can actually get done quickly.*

— Corey Taper



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## Speeding Up the Quoting Process with QuoteWerks

Now Corey Tapper, president of Techevolution, uses QuoteWerks every day.

“It took me three minutes this morning to do a quote for a laptop, including labor and everything, and send it off to the customer. They had it signed and back, and the whole experience lasted 10 minutes, which is pretty amazing,” says Tapper. “It definitely helps to close the deals. If you respond to the customer quickly, QuoteWerks helps you land the deal. It’s awesome.”

Tapper says QuoteWerks is an excellent way to keep track of quotes because it can integrate the information into their ConnectWise Manage system. This keeps their whole sales process working smoothly.

With QuoteWerks, Tapper can type in the vendor information for a part, and the data automatically populates within QuoteWerks. He can add the details to the quote, input the labor, save it, send it off, and it is done. All of this equals a huge time savings.

If Tapper needs additional information from a previous quote, he’s able to go back and review what they’ve quoted for customers in the past to compare the data. That’s powerful insight.

## Fast and Easy to Use

Speed and ease of use were Tapper’s goals when evaluating the product. Since he’s been using QuoteWerks, employees tell him about other quoting software, but he emphatically says Techevolution is not switching.

QuoteWerks integrates with ConnectWise out-of-the-box. The whole sales pipeline process works seamlessly within QuoteWerks. This integration allows Techevolution to cut down the time it takes to do quotes significantly, improving overall efficiency.

Because Techevolution can turn a quote around so rapidly, they experience a high success rate of closings. Tapper explains that although he doesn’t have exact metrics, he estimates that 99% of Techevolution closes can be attributed to the fact that they can quote so quickly.

After implementing QuoteWerks, Techevolution noticed results right away. They had some initial issues with how SKUs were set up. This had to be fixed so the information would flow properly to ConnectWise. Taking that extra step saved a significant amount of time in the quoting process.

“When I do a quote, I actually get excited because I know it’s something that can actually get done quickly,” says Tapper. “We’ve done a lot of quotes, and I’ve never had issues with the application.”