

Helping Your Team Close Deals Faster



Introduction

Accuracy, efficiency, and consistency are paramount to teams when it comes to creating and sending contracts and proposals. In most cases, team members have to dig through multiple files to find the most updated content or copy. Branding is often inconsistent when people outside of the creative team are handed files to edit, and ultimately, the more hands in the pot, the more files that are created, the more likely it is that proposals and contracts are sent out late causing a delay or lack of sign-offs for approval.

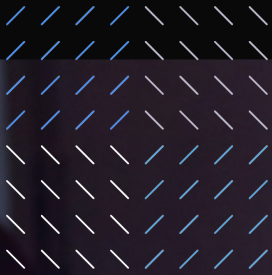
SavviSPX™ gives businesses their time back by reducing discrepancies in workflow and accuracy to improve sales conversion. At the end of the day, the goal is for businesses to accelerate deals and beat quotas.



SavviSPX™ was born out of the necessity to create accurate proposals, quotes, and contracts that can be executed electronically.

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What is SavviSPX™?

“Content management and document management systems, or lack thereof, are failing marketing & sales teams.”

Company collateral is unorganized, owned by specific employees and lives in many different places. Tracking down content is time consuming and costly, having dated, inaccurate content is a financial threat. Untimely delivery kills conversion.

Marketing & sales teams are tasked with finding ways to increase productivity, find more efficient processes, and improve the bottom line in addition to oversight of employees. Without a streamlined approach to workflow, teams are losing out on quick delivery and faster sign off.

What if there were a product that allowed organizations to improve sales conversion, assemble documents much faster, and receive sign off sooner, improving the bottom line?

SavviSPX™ is a cloud-based organizational document creation and content management system that enhances speed and efficiency all while creating a simple experience for users. The most important piece of SavviSPX™ is its ability to quickly pull content from a library of assets. With this software, you'll experience faster collateral creation, streamlined communication, and an overall more collaborative experience, and most importantly, improved sales conversion.

More Than A Word Processor Or Graphic Design Tool

SavviSPX™ is a web-based tool that can be used from small businesses to large enterprises to create on-brand templates that company representatives can use and reuse to customize details for the next deal. SavviSPX™ stores assets and content that the reps need in one safe location so piecing together a proposal can take minutes as opposed to hours. With this unique buying experience, companies are finding that they are able to close deals faster, thus greatly impacting their quota.

UP TO DATE

As quickly as new content is added to a document, up to date content can be saved to a centralized content library so users no longer need to search for revised documents. Users love the simplicity and that SavviSPX™ saves them time and resource

ACCURATE

Content can be maintained and authorized by subject matter experts. SavviSPX™ also saves time by eliminating unnecessary email communications determining whether or not the team has the latest content.

APPROVAL

Content can be locked in and only specific permissions can be given to people on the team. Legal departments can own legal documents and lock them safely without worrying about someone accidentally changing out important information.

EFFICIENCY

Users have access to updated content that they can easily drag and drop into the document without having to hunt through files and emails.

ON BRAND

Brand assets can all be developed in one central place so teams don't need to rely on graphic designers to make edits. All approved, branded, design elements are available for content creation without requiring graphic design tools and knowledge.



SavviSPX™ allows for better collaboration, faster delivery, keeping content on brand, and enforcing brand standards.

How SavviSPX™ Works

SavviSPX™ is a unique platform that allows departments to own what is theirs and allow permissions to team members. Additionally, the dashboard allows users to have better control over their content and collaborate quickly and efficiently.

When you first login to SavviSPX™, your dashboard will allow you to search for any relevant documents and also display an activity stream where users can filter which events are most important to them such as who is editing or where your document stands in the approval process. You are able to see what documents that you're currently working on in addition to the documents you've been invited to collaborate on.

Teams have better control over their content as it can be secured in the library by access control groups. A legal group can have access to legal content only so that other teams members cannot make edits to it. Team members have the ability to lock in content that other users will not have access to.



SAVVI  SPX™

The document features in SavviSPX™ are plentiful; users can add custom personalization for the particular client they are working with. Current users love that they are able to collaborate with team members to proof and add elements while they are both in the document, allowing the building process to be a lot faster than that of a traditional build out. It is fast and efficient to be able to drag and drop elements of the page such as testimonial sections, headers and footers, branding, and even rich media into place. In addition to the photo and other branding elements, videos can be embedded from YouTube or Vimeo into the page you are working on.

Sales teams are able to beat their quotas and receive faster sign off with SavviSPX™ digital signatures. SavviSPX™ provides multiple modern designed digital signatures that allow businesses to quickly sign off on proposals without the process of printing, signing, and figuring out how to re-upload the document.

SAVVI  SPX™

How SavviSPX™ Benefits Your Business

FASTER DELIVERY FOR DEALS

SavviSPX™ allows documents to be quickly created without spending hours collecting the latest required content. This causes inefficient processes and delays. On the fly editing and eSignatures make proposal and contract processes run smoothly so that deals can close faster.

BETTER COLLABORATION

When working with different departments on your team - like sales, marketing, legal, and engineering - SavviSPX™ allows you to pull in content from individual departments to ensure documents have the most up-to-date information. Additionally, the user-friendly interface allows each team to easily edit and adjust existing documents. The more efficient the collaboration, the faster the proposal can be sent out.

STREAMLINED MANAGEMENT

Managing your business and others with SavviSPX™ makes communication easy by using a single interface source, searchable repository. Your content and documents are displayed in real-time with previews and the time of recent modifications, making it easier to access and organize documents. Additionally, searching for documents under certain criteria allows for easy recall and reorganization as necessary.

SavviSPX™ Feature List

Library

Integrated Product & Services Catalog.

- Build dynamic contracts, work orders & sales information in minutes
- The most up to the minute compliant document system on the market today
- Drag & drop interface
- Critical CRM / Contact Database
- System browser-based

Contract

Contract & Collateral build in minutes.

Approach:

- Review all document audit trails.
- Select team member for both client and team builds in each document created
- Select contract budgets and billing types
- Manage client expectations, versions and releases
- Ensure compliance
- Cross-publishing abilities into already created files from previous documents and users
- Stylesheet validation and design normalization

eSignature

Legally binding eSignature (USA Standards)

Approach:

- Create detailed action plan.
- Execute and audit
- Review / update policies and procedures
- Compliance liabilities and plans
- Mobile sign

Pay

After contract execution integrated into Fiserv™ payment gateway - CardConnect™.

- "Pay Now" integrated
- Connects to 3rd party payment reports
- Mobile pay
- Money Deposited 'Next Day'

SavviSPX™ More Features

Library

Document Creation

- Custom Variables and Fields
 - Client, contact, and document level fields
- PDF Creation
- Utilize existing PDFs in a document
- Content Reusability and Templating
- Online Document Creation
- Professional design library
- Custom Branding*
- Videos
- Drag and drop visual document builder
- Rich text controls
- Image manipulation

Product Catalog

- Search, filter, sort and select items to be added to a quote

Workflow

- Collaborative document creation
- Content level security
- Document Teams

Contract

Content Management

- Content library with built in content level security
- Single source content
- Document customization

Cross-publishing into already created content

- Role-based Authoring & Content Ownership

eSignature

Signature Process

- Document Signing
- Support for “Wet” signatures
- Multiple Signatures
- Auditing
- Rescinding & Corrections

SavviSPX™ More Features

Pay

Payments

- Virtual Terminal
- Customer Payments
 - Visa, Mastercard, etc
 - ACH
 - Transaction Reporting
 - Chargebacks & Refunds

Security

Security and Scalability

- 2 factor authentication
- Regulatory compliance
- Signature history and audit logging
- Content level permissions
- User, Role, and Access Management

Administration

User Account Management

- Alerts and notifications
- Custom Fields

Customer Relationship Management

- Document pipeline
- Custom fields
 - Customer, client, etc.

Authentication

- 2 Factor
- Common

Reporting and Audit Trails

- Audit Trail reporting
- Audit Trail Export associated with executed agreement.

SavviSPX™ More Features

Mobile

- Mobile Signature Enabled
- Mobile SMS Enabled
- Mobile Payment Gateway

Integration

Professional Services

- Implementation of existing or new designs
- LDAP Integration
- SSO Integration
- Implementation of existing or new content
- Integration with 3rd party systems:
 - Popular CRM Systems
 - Payment Gateways
 - Vaulting Tools

ENFORCE BRAND STANDARDS

SavviSPX™ allows you to create branded templates for your digital and print collateral with ease. You can build a content library capable of holding a variety of templates and easily change the look and feel of your print collateral at any time.

UNLIMITED CREATION

Unlimit your creative mind with easy and innovative creative capabilities on SavviSPX™. With simple in-line editing and copy-paste abilities, users see their adjustments in real-time to ensure a beautiful and functional composition each and every time.



In Conclusion

Creating proposals from scratch can be a cumbersome process that can take up too many hours. The slower the proposal process, the more likely it is that the party on the receiving end will drag their feet on final sign off. A streamlined process can shift the way that proposals and other large documents are written, shared, and sent off for approval.

SavviSPX™ provides its users with tools that allow them to create custom-designed, reusable templates so that proposals can be produced quickly without compromising quality. Those who lack experience with complex design tools will find that SavviSPX™ has simplified the process and made it much easier to edit without knowledge of Adobe™ InDesign™ or Illustrator™.

SavviSPX™ takes the unique features and marries them to make one bustling platform that not only is easy to use and collaborate on, it also speeds up the process by adding digital sign offs for faster turnaround times. This platform also offers team features with different user permissions and gives you insight on when a client has opened the document and when they've signed off.

With the right platform in place, businesses can take control over their proposal and contract process. SavviSPX™ is changing the landscape for proposal creation by offering better insight on projects, accuracy in terms and branding, and endless efficiency. Faster turnaround time means faster closes, and the faster businesses can focus on the work that really matters.

About Savvior

Savvior helps industry leaders run more smoothly through technology. We help our clients isolate and solve particular business problems through the design and development of elegant custom web, mobile, and software applications, and the integration and creation of custom enterprise applications. We focus on rapidly and efficiently connecting users to big data. For more information, head to <https://www.savvior.com>