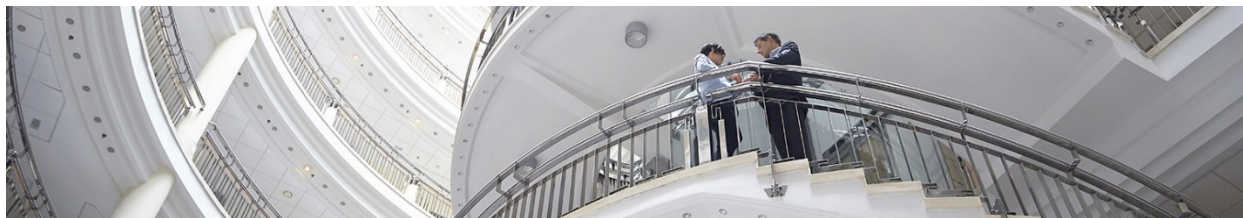# Sales Proposal Generator (SPG)

Cisco Whitepaper

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The Sales Proposal Landscape – Why Automate?

Introduction

Experts agree that an effective sales proposal will keep selling long after the seller has left the sales call. In today's environment of solutions — not products; trusted advisors — not salespeople; value — not price; virtual — not physical; sellers have to navigate a dynamic and ever-changing buyer landscape.

So how does sales collateral keep up with this demanding one-off, custom, one-size-does-not-fit-all marketplace?

More importantly, how do sellers ensure that their proposed solutions receive the customer visibility that leads to winning deals, corporate revenue growth, and the accolades that go along with sales success?

To investigate these questions, it's important to consider just how buyers buy today, and with that, how do sellers most effectively market their products?

Today's Market is Changing

How do you think your customers make purchase decisions today? Do you believe they buy products that magically appear in their web browser —"Time to order a new pair of running shoes, and voila!"? Sometimes they do, but not necessarily so.

Addressing your customer by their name and being fully aware of their interests and buying history is much more effective than throwing products against the wall to see what will stick. This type of "buyer-focused" marketing, aligned to your customers and their specific wants and needs, is more efficient than hoping your product will catch the buyer's attention from among the hundreds of other products presented in a web search.

It is likely that your own purchases have been influenced by these tactics, combined with a product presented in a compelling way that made you perceive some level of personal value of ownership.

Cisco Seller Challenges

Consider our Cisco sellers, charged with selling technology to large commercial and Fortune 100 global accounts. In the past, these companies were mired in procurement hierarchy, rendering it virtually impossible to make a human connection with the corporate business decision-makers. More so, sales discussions of the past always seemed to move quickly toward the product, features, and of course, the price.

Addressing the feelings of the buyers and how the technology might positively impact them—improve their work/life balance, give them the ability to work from anywhere, target specific industry users, and offer features to their customers—-was typically an afterthought, secondary to the product's specs—e.g.,

processor characteristics, real-time response in nanoseconds, the number of ports on a card, the quantity of GHz, etc.

While this may be how technical decision-makers buy, this is not what matters to the CXO level decision-makers who sign the contract along with the purchase order and subsequent renewal agreements.

Let's face it, CXOs are just like the rest of us. They review product choices, they determine what they like, and they make purchase decisions based on what makes them feel connected to a solution or a company.

So, how did any seller ever go about making a human connection with a buyer, selling with the proverbial "boilerplate" sales proposal?

The answer is: they likely did not!

The Future of Sales Proposals

How can you make a human connection in a sales proposal when you are a company like Cisco, which along with its partners, is submitting more than 20,000 proposals per month, consisting of over 200 high-level products, across 11 industries, where most often multiple product solutions are offered?

You can hire an army of sales proposal specialists, attempting to personalize the proposals with content that provides that human connection. But what if you could automate this level of customization?

Just imagine as a buyer, you receive a proposal that mentions you by name, includes your Cisco account manager and partner contact information, contains images aligned to your industry, speaks about the specific users in your type of organization—schools, medical facilities, oil fields, for example—and contains multiple products to create a single, fully secure solution, tailored exactly to your business needs.

- Would this be more relevant?
- Would this differentiate Cisco from its competitors?
- Would this make me feel like Cisco really went the extra mile to gain my confidence?

Of course, it would!

And what if you could put this custom sales proposal into the hands of any of your thousands of sellers around the world in under five minutes—with the proverbial "just a few clicks"?

In the following sections of this document, we will describe how we accomplished this. But first, let's take a look at how Cisco and many other companies currently provide sales proposals for their sellers.

Current State

The Proposal Library Concept

Cisco currently provides its sellers and partner sellers with Microsoft Word proposal templates. These templates are kept in an online library (Cisco SalesConnect), and sellers retrieve them when needed to accompany product offers to new and existing customers. Often, these also include pricing, which forms a legal record of the offer.

The current proposal templates are single-product and generic from an industry perspective. They contain yellow highlighted placeholders to indicate where the seller needs to manually update to include the account name, seller contact information, and partner name (see image).

Needless to say, these "templates" require a great deal of editing to bring them up to a customer-ready state.

In order to create a multi-product solution style proposal, the seller has to manually assemble content from various proposal templates. If they want to make the proposal more tailored to a particular industry or user profile, they have to go through the entire template or templates again to manually personalize the verbiage. This, as you can imagine, is also very time-consuming.

The typical global usage of these templates is approximately 15,000 per quarter. Considering a conservative estimate of two hours for a seller or partner to update a proposal template, this equates to approximately 120,000 hours spent annually performing menial content additions.

The Cisco Proposal Content Team maintains approximately 300 different product proposal templates. These are reviewed at least every six months to make sure the information is up-to-date. This incurs overhead costs. When a proposal needs updating, both versions—the Cisco seller and the Partner seller—have to be refreshed. This translates to duplicative and monotonous work.

Additionally, there is no way to track how the sellers and partners are using the proposal templates and what value they add. For instance, was the proposal used for a specific deal which resulted in a winning offer? And if so, what was the revenue associated with it? If we had this type of information, we could better evaluate the effectiveness of each product proposal template.

To summarize our current state:

- Proposal templates are single-product (not solution-oriented)
- Proposal templates are industry-agnostic
- Sellers and partners spend valuable time converting the proposal templates into more personal proposals for better impact
- This system requires redundant maintenance of Cisco Seller and Partner content
- There's no way to connect proposal usage with specific deals or wins

There must be a better way!

Proposal Automation

With Cisco, now there is a better way—the **Cisco Sales Proposal Generator** (SPG)!

SPG was born out of a desire—actually a need—to provide fully custom proposals aligned to our customers, their industries, and their users, at scale, and available to our worldwide Cisco and Partner sales teams. We set out to:

1. Reduce the effort required to create custom proposals.
2. Enable secure multi-product solution proposals.
3. Realize efficiency gains for our sellers, partners, and content management teams.

Let's take a look at how SPG facilitates each of these outcomes.

Support cross architecture sales plays

Custom deal parameters from SFDC

Saves seller time

Customized, customer-relevant content

Grow Pipeline with bigger offers

Custom Proposals at Scale

Earlier, we discussed how a tailored proposal, exclusive to each of our customers, provides a more relevant connection with them. These proposals also need to support Cisco's vision to provide customers with integrated secure solutions. The solutions most often contain multiple complementary products. With SPG, you can include up to three products merged into a single proposal. Also, SPG automatically adds industry-specific text and images to provide a more personal connection with our customers.

But considering Cisco's thousands of customers, extensive partner network, and solutions containing a seemingly infinite number of product combinations, how can this level of personalization be possible?

Automation Is the Key

First, let's talk efficiency and deal relationship.

By providing a *Custom Proposal* selection directly within our CRM (Salesforce), sellers can align their proposal requests with specific sales opportunities. To accomplish this, SPG can retrieve pertinent details from the opportunity in Salesforce and gather other specifics directly from the requestor.

An SPG Custom Proposal Request form is automatically populated with:

- Seller Type (Cisco Seller or Partner)
- Account Name
- Requestor Name and Email
- Deal ID and Opportunity Name
- Geography and Theatre
- Industry
- Competitor(s)

The requestor only has to answer the following:

- Document Type—proposal or executive summary, chosen from drop-down
- Product(s)—choose up to three from a searchable menu
- Proposal Title—auto-populates by default but can be edited as well

- Proposal Date—if a future date is desired

This form takes less then a minute to fill out. The requestor selects the *Create Proposal* button and their very own *My Proposal Requests* page opens, showing the requestor's entire request history.

The latest request will show as *In Progress* until, within just moments, it updates to *Success*. If an error occurs during the document rendering, its status on the *My Proposal Requests* page will indicate *Failed*, and an email is sent to the requestor. Our SPG support team will soon be reaching out to them to resolve the issue.

Within mere minutes of clicking *Create Proposal*, your fully custom proposal arrives in your email inbox.

The Industry Aspect

Because of the importance we have placed on leading with our customer industry images and user profiles, we have built custom industry content into all of our SPG proposals so that specific text appears based on the industry defined in Salesforce, or in the requestor's selection.

In other words, every proposal contains content options to be inserted depending on which one of the **11 supported industries** the proposal request form indicates. Images are also industry-specific for added impact. (See healthcare proposal example at right.)

This customization happens whenever these key areas are discussed:

1. Industry type
2. User types
3. Location types (branches, campuses, etc.)

For example, a **healthcare industry proposal** would include this text:

"Our Cisco Webex collaboration solution for the healthcare industry enables your doctors, patients, visitors, and administrators to communicate seamlessly throughout your hospitals, labs, and cafes."

And an **oil and gas industry** proposal might include this text:

"Our Cisco Webex collaboration solution for the oil and gas industry enables your scientists, geologists, and field workers to communicate seamlessly throughout your oil fields, labs, and remote facilities."

To build this level of customization into our sales proposals has been a serious labor of love, of which we are all quite proud!

Partner Alignment

As we mentioned earlier, proposal templates in the current library contain both Cisco seller and Cisco partner versions. These versions can be quite similar, but the partner documents are written from the Partner Sales voice. They contain the partner name and other partner-specific text, such as: "Partner A proposes" or "offered by Partner B."

With SPG, we have eliminated the need to maintain redundant proposal libraries—both one for Cisco sellers and one for our partners. Our proposal generator triggers text from the voice of a Partner seller as well as from a Cisco seller. Partner content is only turned on when a partner proposal is requested. For instance, a partner proposal will already have the partner's name appearing in strategic places throughout the document, based on the information provided on the request form. Also, the proposal has placeholders reminding the partner seller to insert their logo.

To get this level of partner-specific customization, all the partner seller has to do is provide the partner name on their request form. No additional efforts are needed. The SPG does it all for them. This markedly reduces the time for partners to create proposals, and the energy spent by our proposals team maintaining a separate partner-specific proposal template library as we currently do.

Solution Proposals

A key to Cisco's sales success lies within the breadth of our portfolio. Our industry-leading security products are typically top of mind with our customers. It is more effective for both Cisco and our customers to offer solutions which can grow and evolve over time, as opposed to selling, integrating, and adopting single-product sales.

For this reason, we set out to build the ability to combine our sales proposals into true multiple-product, solution-style offers—also known as Sales Plays.

We knew the easy way to do this would be to present all of the content for product A, followed by all of the content for product B, and so on for product C. However, this was determined to not be a reasonable approach for our customers, who typically want to consume the information in logical segments. For this reason, we segmented our proposals into the following sections:

- Introduction
- Advantages
- Benefits
- Case Studies and Testimonials
- Details
- Components
- Services Overview
- Finance
- Placeholders for Pricing and Appendices

This logical construct allows us to align and merge the like sections from the various product documents into a truly solution-oriented proposal.

These multi-product solution-style proposals include an introductory paragraph describing the solution-level approach and its value, as well as listing the two or three products contained therein.

Solution Architecture Overview

Reader note: This section provides a deep-dive into the inner workings of the SPG. If "how it works" is not of interest, you may want to skip to the next section—SPG Functionality.

## A Dynamic, Conditional, Modular Approach

In order to create the custom-tailored features described above, we implemented a dynamic, conditional, modular approach. In short, we:

- **Dynamically embed** the customer name, partner name, account name, and proposal title using content reuse references, known as *conrefs*.
- Apply **conditional filters** based on the industry, proposal type, and seller type (Cisco seller or partner). Profiling content phrases this way means we can personalize text and images.
  For proposals highlighting Cisco solutions coming from partner sellers, we are able to insert the partner name and partner-specific conditional text.
- Use **modular content** to reuse topics within chapters of product-based content. This modular approach enables the merging of content from multiple products by using content type tags—for example, Introduction, Advantage, Case Studies, Components, etc. By using pre-defined yet dynamic bookmaps, we can build multi-product proposals as well as more succinct executive summary documents.

By setting up our content in modules, we can streamline content updates across all or multiple proposals. For instance, if a change is needed to our legal disclaimer, we only have to change it in one location, and thereafter, all future proposals will contain the update. This offers a vast improvement over our current proposal template library, in which time-consuming duplicative manual edits in each of our proposal templates would be required.

The modular content is set up in Darwin Information Typing Architecture (DITA). This open-source platform provides structured authoring in XML which can be output as PDF, HTML, MS Word, and so on.

Using DITA standards and an Adobe XML add-on, we configure and manage the modular content in a repository. This web editor is an easy interface with versioning and workflow management features.

Sales Proposal Generator Architecture
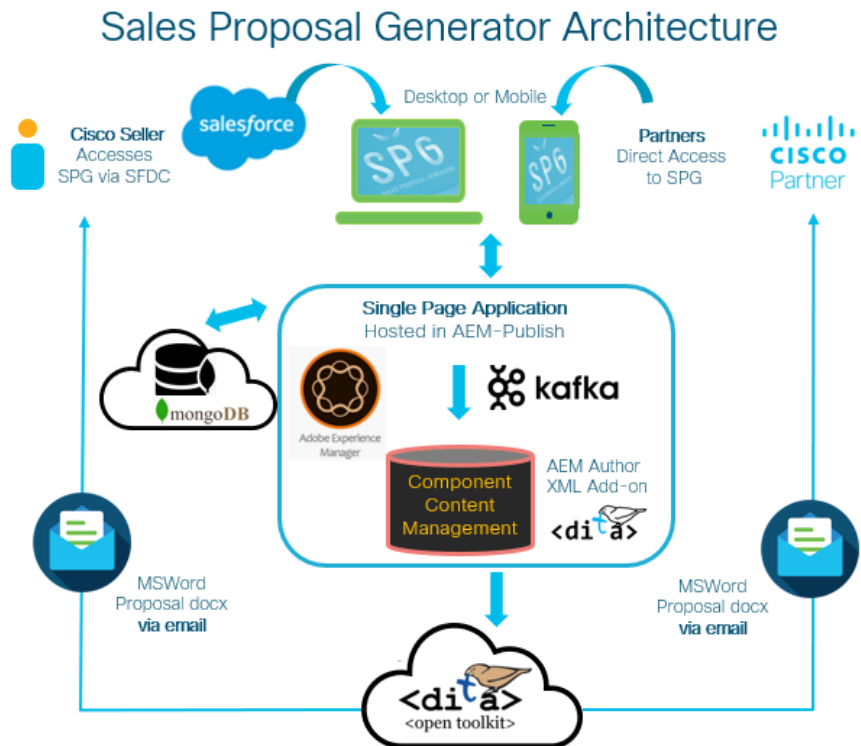
We use DITA-OT to transform the DITA XML content into the desired MS Word output format, while maintaining Cisco brand requirements for style and configuration.

DITA-OT is an open-source software that runs on standalone VMs or Docker Containers. We have hosted the SPG in a VM that can scale horizontally to handle concurrent requests.

We used Adobe Experience Manager (AEM) to design and launch the single-page web application for Custom Proposal Requests. We also used RESTful APIs which are invoked via AJAX calls to update transactional data in mongo db (refer to SPG Architecture diagram). The transactional data shows the status of each proposal request. If there are issues with any of the requests, the administrators are provided information to detect the problem, make a correction, and assist the users in resubmitting the request.

The single-page application contains an admin module that allows proposal administrators to configure product names in relation to the template locations from the repository. This ensures that when users select products on the request form in the SPG interface, the correct product template is selected to create the Word output. In the case of multi-product proposal requests, we dynamically create the proposal document in the repository using modules from the single-product templates.

We store the dynamically created multi-product proposals in mongo-db, so that subsequent requests for the same multi-product combinations leverage the existing document from the repository.

We have used Stilo Migrate conversion services to convert all the existing Word documents into targeted DITA-model XML modular content. We have developed tags in the Word documents to specify the beginnings and the ends of topics and of chapter titles; the profiling attributes for sets of industry phrases; the profiling attributes that differentiate Cisco Seller versions from Partner versions of text; and placeholders for customer name, account name, requestor email, etc. These are converted as conrefs. All conrefs will have a target phrase in a reuse variable topic which is basically common for all product templates.

This Is Where Stilo Comes In

Through the provision of innovative technology and expert services, we support XML standards across numerous industry sectors, including the Darwin Information Typing Architecture (DITA) used for technical documentation.

MIGRATE

Migrate is a cloud service that enables technical authoring teams to convert content to DITA from source formats including Word, FrameMaker, RoboHelp and XML/SGML/HTML. Simply upload your sample document (20-30 pages) and we will convert it to DITA free of charge and review the results with you.

We also profiled and tagged a specific banner image for each of our 11 supported industries to be included on the first page of the proposal.

Stilo's team has provided immeasurable support for the extremely complex scenarios needed for the SPG conversion scripting.

We performed post-processing of the converted files to map the boilerplate (common topics)—such as the pricing, finance, and appendix modules. We then uploaded them into the AEM repository in a meaningful folder structure for each of the products along with its architecture name to define the parent folder's name. This ensures the links from the product bookmap and chapters are intact after uploading the converted content into the repository. When Sellers request a proposal, all the links to the chapters

and topics are properly exported to the DITA-OT engine to render the complete Word document with all the profiling, insertion text, and images.

We have attributes at the chapter level that determine which text module it contains—for example, the Introduction, Benefits, Advantage, or Customer Case Studies and Testimonials. This became very useful in the merging of two single-product documents into a multi-product solution-style proposal. We have used parsing to extract each of the topics, in order, from the single-product proposals and aggregated the multi-product proposal dynamically.

SPG Functionality

With the introduction of SPG, Cisco sellers can now request a proposal by selecting *Custom Proposal* from their Salesforce (SFDC) opportunity. Partner sellers and other users can launch the SPG web application directly from the SPG web interface.

When SPG is launched from SFDC, the request form is auto-populated with opportunity information via API calls. This (see form at right) includes:

- Requestor Name
- Partner Name
- Account Name
- Deal ID and Opportunity Name
- Account Segment and Geo.
- Industry
- Competitor Name

The fields can be modified, and drop-down menus are provided where applicable.

After submitting the proposal request from SPG, the proposal DITA modular content template from AEM is sent for MS Word rendering to the DITA Open Toolkit application.

Each requestor has a *My Proposal Requests* view which keeps a history of proposal requests, their completion status, and related information (see image below).

Once the MS Word file has been successfully generated, within just moments, it is delivered to the requestor via email.

Within the SPG interface, administrators have special access functions, depending on their permissions, to the products listing, product families (architectures), and product mapping as stored in the AEM repository.

The SPG functionality has been thoroughly tested and demonstrated throughout our user community. It functions properly and easily, and we are introducing this innovative SPG tool to our sellers and partners worldwide.

Looking Forward

With any successful project, we have to ask: "So, what's next?"

Our vision for the evolution of SPG is to leverage the work we've done thus far to implement web-based microsites to deliver our proposals. This will facilitate the integration of pricing and business value cases based on Solution Builder technology. It also will provide a platform for custom video messaging from our Executive Sponsors and Account Managers.

Also we are part of Cisco's Digital Convergence Program, focused on digitizing the relationship between our sellers, the support they need, and the content that can help them achieve success throughout the sales cycle.

Our ultimate vision is to leverage AI to best define the support needed and the next steps that our sellers should most probably take to ensure their success and to grow our business.

About the Authors

Neil Thomas: Leader, Digital Sales Enablement, Cisco

Neil is a lifetime participant in the evolution of the telecommunications industry. He contributed 28 years to developing, integrating, supporting and demonstrating Nortel solutions for Fortune 100 customers worldwide. For the past 8 years, Neil has focused on Cisco Sales Enablement through bid management and proactive custom proposal development. He is currently leading our proposal content development team. Neil's recent focus on the delivery of digital sales solutions, including SPG, is helping to drive cost and time efficiencies into our sales processes and to enable seller success.

Karthikeyan Rengasamy: Principal Architect, Cisco IT

Karthikeyan ("Karthik") is a solution architect who is always passionate in providing custom solutions, while thinking outside the box to address business challenges. He has spent 22 years in the software industry, architecting and developing software applications for his company's growth, and to help achieve their organizational goals. For the past 13 years, Karthik has focused on transforming the authoring and publishing processes for Cisco Technical Product Documentation. He has recently focused on leading the Cisco IT team in the automation of Cisco Sales Proposal creation through SPG. He carries an additional responsibility of leading an operations team to ensure Cisco.com, the company website, is performing at four nines (99.99%) availability annually.
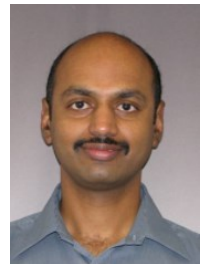
Our Team

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Thank you.