



## GETTING STARTED WITH ECHOQUOTE™

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## Introduction

Thank you for considering EchoQuote™ to drive new business for your company. This document summarizes the steps we will follow to make your implementation of EchoQuote™ smooth and non-intrusive. EchoQuote™ has been designed to work within your existing sales and marketing framework with minimal “care and feeding” on your part.

## Goals

1. Simple setup and trouble-free operation.
2. Improve your Customer’s experience with your website and your company.
3. Capture a higher number of better quality leads using the promise of Self-Service Pricing.
4. Capture leads earlier in the sales cycle when the project requirements can be influenced most.
5. Empower the sales force to take ownership of leads and act on them faster.
6. Show measurable marketing results for dollars spent.

It is important to understand where EchoQuote™ fits into an organization’s sales process because we will need cooperation from both the sales and marketing groups. EchoQuote’s™ value is that it helps connect a sales team to interested prospects very early in the Research phase (Figure 1) when the prospect is developing his Decision Criteria. The sales team will be directly involved in the approval of quote requests.



Figure 1 – EchoQuote™ uses Budgetary Pricing to engage the prospect during the Research Phase

## How Long will it Take?

Most implementations only take 1 or 2 days with the majority of the work being done by us. Once again, our goal is to make the transition seamless for you using processes and people that are already in place. This service does require live links from your organization's website to EchoQuote™.

## Summary of Steps

### ***Initial Mutual Non-Disclosure Agreement***

EchoQuote™ will be providing an integral service for your organization and requires access to certain confidential information, mainly Commercial Pricing and possibly channel strategy. To ensure confidentiality, we insist on a Mutual Non-Disclosure agreement signed by both parties. This will allow us to load your information on our test system for your review.

### ***Planning***

All groups that will benefit from the implementation should be involved in the planning discussion including marketing, sales and the website administrators. What we need to establish are:

1. Where will we place the links on the website?
2. What pricing programs do we want to offer? We recommend no more than 2 to start with; List and/or GSA if applicable. Each pricing program can have its own set of approvers.
3. Who will approve the quotes? These designated approvers should have access to email via Blackberries or other Email enable PDAs.
4. When a quote is delivered (approved and sent by the system) who should be carbon copied? Some organizations send a copy to a sales/marketing archive account.
5. CRM integration. As quotes are requested and lead information is captured, the organization may want to capture that information as an inbound lead. EchoQuote™ is integrated with Salesforce using an Organization ID tag. This feature is included at no charge.

### ***System Setup***

After the Non-disclosure is executed we will ask for several basic pieces of information like logos and a current List and GSA price list (we can generally capture GSA pricing from public sources). We will load your information onto our non-public test system to allow you to test and verify your information.

### ***Trial Period***

After verifying your configuration on our test system, we will move it to our production web servers for a Free Trial Period.

### ***Go Live Agreement (Terms and Conditions of Use)***

At the end of the trial period you will decide if you want to continue the service. If so, we will execute the Terms and Conditions of Use Agreement. If not, we will deactivate the portal and remove all captured lead information from our system.

You are now ready to take advantage of EchoQuote™ risk free.