Success Story

Headquartered in Markham Ontario Canada, Doxim helps financial service providers create, deliver and manage business-critical documents and content more efficiently and cost effectively. Doxim serves over 300 Credit Unions, Brokerages and Banks, both directly and via strategic Service Provider relationships across Canada and the United States.

In April 2010 Doxim approached KeyRoad Enterprises for assistance with sales training to help meet its current and future revenue goals and prepare the company for faster growth.

At the time, the company faced a number of challenges:

- The sales team did not have a common approach to the sales process
- The sales engagement model did not facilitate objective pipeline evaluation or sales forecasting, beyond relying on the sales team's 'opinions'.
- The sales team had difficulties duplicating the intuitive conversations the executive team, including the CEO, was having with its prospects. Particularly when it came to helping clients identify reasons why they would need Doxim's offering and the benefits they would enjoy by using them.

The company, its CEO and VP Sales wanted to:

- Better manage the sales cycle by implementing more independent and objective validation of sales opportunities.
- Implement standardization across the company by managing and driving sales activities using stages and milestones that more closely mirror the prospect buying cycle
- Establish a common vernacular for this new process, so that all involved parties were speaking the same language
- Deploy selling tools and messaging that helped the sales team complete each selling stage more effectively while identifying compelling reasons and financial metrics that resonated with prospects and helped them to justify their purchase decision.

Doxim decided to retain the services of Philippe Lavie of KeyRoad Enterprises to help:

- Formalize the sales process for its team and develop the go forward sales engagement model (sales process, roles, responsibilities, hand-offs, etc.)
- Ensure opportunities were managed and tracked through the CRM consistently and objectively by all participants
- Ensure that the required account mapping processes were followed and reflected in the CRM system
- Heighten the importance of consistent prospecting to fuel growth targets through cold calling, referral selling, networking and targeted marketing investments
- Enhance the messaging used in the sales and marketing process to make it more meaningful, concise and impactful
- Ensure that all members of the sales force were exposed to tried and tested selling best practices

In May 2010 KeyRoad Enterprises' Philippe Lavie, trained Doxim's entire sales, marketing and executive teams using the Customer Centric Selling® methodology. Philippe also helped design

and implement a new engagement roadmap that was more closely aligned with Doxim's prospects' buying process. Finally, Philippe assisted Doxim in creating a series of sales tools as part of an overall sales toolkit, to enable a more efficient and effective sales performance.

As a result, the company has managed to:
- Implement a standardized and replicable approach to its end to end sales process,
- Gain much better, objective visibility into the pipeline and sales forecasting
- Implement a robust, objective approach to opportunity qualification
- Achieve much greater clarity around which deals are going to close when
- Improve Profession Service resource planning for all implementations

Chris Rasmussen, Doxim CEO, is very pleased with the results:
"Implementing a standardized sales process like this takes both commitment and time from all parties. We've seen some great results already and are confident that the investment we have made will pay for itself many times over in the future. By gaining real clarity across our complete opportunity pipeline, we know where we need to focus time and effort to keep the deals rolling in"

For more information about Doxim, please visit: www.doxim.com. For more information about KeyRoad Enterprises, please visit: www.keyroad.com.