

Case study: Duncton plc

Duncton plc streamline sales processes with Zetadocs PDF

Founded in 1992, Duncton caters specifically for individuals, partnerships and businesses that are experiencing difficulties in funding vehicles. Duncton is a privately owned plc based in West Sussex, with an established reputation as the UK's leading specialists in non-conforming vehicle finance.



The problem

In a competitive market like vehicle finance, it is important that deals are closed as quickly as possible.

“Like many companies selling financial products, our sales process is very paper intensive. After agreeing funding with a customer my sales teams were spending almost 30 minutes completing and printing a pack that contained an introductory letter, a contract and direct debit details. This then had to be packaged and posted to the customer,” explained Neil Eustace, Head of Sales and Marketing.

Neil had two major concerns with the existing process. He realised that the time taken to assemble welcome packs was essentially dead time and could be used more productively on revenue-generating activities. And also there was the chance that during the time taken to produce and send the documents, the customer could change their mind and source an alternative deal. Addressing these problems represented a great opportunity to increase productivity.

Duncton had evaluated Adobe Acrobat to send their documents as PDFs by email. They were satisfied with the PDF conversion results, but it did not address the problem of providing a seamless creation of an electronic file that they could email to their customers. It still required each document to be created separately and it was not easy to combine documents, so it did not offer the improved efficiency they were looking for.

The Requirement

Duncton wanted to reduce the complexity of creating contracts for their sales teams to help them focus on securing more business. Finally, the documents needed to be created quickly, yet still maintain the quality that Duncton are known for. An ideal solution would also need to link to their CRM system, so that it would be easy to use and maintain an automatic record of all correspondences.

What they say about
Zetadocs PDF

“Since integrating Zetadocs the sales team are able to complete 15% more contracts each month which represents a significant amount of incremental revenue for the company.”

Neil Eustace, Sales and Marketing

The Solution: Zetadocs PDF

Dunton therefore contacted their IT supplier, Henley Software, to seek an integrated solution.

“We chose Zetadocs as it was the only solution that could be integrated with Dunton’s CRM system to generate the contracts automatically, combine them with other necessary documents, overlay company stationery and personalise the email. Zetadocs was the obvious choice,” explained Russell Henley.

After trialling the solution Neil Eustace was impressed, “Zetadocs really did integrate seamlessly, so there was very little training involved meaning our sales team were up to speed immediately.”

The Benefits

“I was looking for a solution that improved efficiency, and I definitely got that with Zetadocs. The reduction in the time it takes my team to get contracts to customers has been tremendous. My teams were spending almost half an hour assembling the documents, and then it would be another day before they were received. Zetadocs means that the customer receives their contract in a matter of minutes,” explains Neil Eustace.

“Since integrating Zetadocs with our CRM system the sales team are now able to complete 15% more contracts each month which represents a significant amount of incremental revenue for the company. We’ve quickly made back the cost of our initial investment and our sales figures since reinforce the fact that we made the right decision.

“We’ve gained other benefits too. As the whole process is now automated, I know that each customer will always receive exactly the right information, every time. We’ve dramatically reduced the mistakes that could have delayed an agreement. And the customers love it too; the PDFs look great and they’re able to obtain the finance they require quicker.”

About Equisys

Equisys produces software packages for document production and delivery, including the award winning Zetafax® network fax server and newly acclaimed Zetadocs® PDF software that creates and emails personalized PDF documents.

Our software products are designed for small and mid-market businesses, and for departmental use at multinational companies. They stand out from the competition by being simple to install and manage, reliable and great value - backed by outstanding service and support.

We have over 60,000 customers, in more than 100 countries, who are served through an international partner network of distributors, VARs, resellers and ISVs.

Our market leading fax server, Zetafax, speeds the flow of critical business documents by enabling users to send and receive faxes on their PCs. It integrates with ERP, CRM, accounting and other applications for automated faxing from those systems, providing auditable records of fax communications.

Zetadocs helps users work smarter by creating and emailing PDF documents, streamlining business processes to remove tedious manual procedures and help companies improve the service levels they offer.

Equisys was founded in 1987 and has offices in London, UK and Atlanta GA, USA.

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