



## FOR IMMEDIATE RELEASE

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## Using Your Salesforce Data in Microsoft Word

***New and innovative technology from XpressDox keeps your sales reps and managers focused on selling, not admin.***

Cape Town, South Africa June 12, 2012—Sales and service organizations who use salesforce.com® (<http://www.salesforce.com>) can now make their customer relationship management (CRM) data available to users in Microsoft® Word (<http://www.microsoft.com>) for use in outbound correspondence, quoting, and contracts. XpressDox (<http://www.xpressdox.com>), a global leader in document automation technology enables this through its new and innovative data access technology.

“Every year sales reps and managers spend an enormous amount of time on admin,” states Chris Pearson, CEO of XpressDox. “Time is wasted on tasks that can be easily automated. Even worse, this is time sales people should be focused on what matters most: selling.”

XpressDox has developed a very simple and effective integration between salesforce.com and Word that does not need expensive and scarce IT resources to implement. This technology enables documents to be populated with real time salesforce.com data automatically, which means that anything from introduction letters to complex quotes and contracts can be produced in seconds, from the office or on the road.

Pearson, with over 20 years’ document automation experience, explains that where outbound correspondence is concerned sales and service teams waste time in 3 main areas: data issues,

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productivity issues, and standards compliance. “With very simple adjustments, most of this wasted time can be recovered and channeled into activities aimed at closing more deals faster.

“Sales people should not be made to wait for information, nor search for it. Information they need to close deals should be made available to sales reps and managers without any effort on their part,” says Pearson.

“If your sales people are waiting for information, you can bet your customers are too. And this means your risk of losing deals gets higher and higher as the seconds tick by.”

A common data issue sales people struggle with is that a customer’s information is either held in many places, or worse, has not been recorded at all. “Whether you use Sales Cloud™ or Service Cloud™ there should be no reason your sales people have customer data replicated outside of salesforce.com,” Pearson says.

“What’s worse is that often sales and account managers have to search for prospect or customer information that has not been captured to salesforce.com at all.”

By simply enforcing a policy that all prospect and customer information must be captured in salesforce.com a company can go a long way to eliminating documentation delays. “Once the data exists in salesforce.com,” explains Pearson, “it is available to users in Word via the XpressDox data access technology so that letters, quotes, contracts, terms and conditions, policy documents and the like can be produced in seconds.

“Another benefit of enforcing this policy is that your data leakage risk is lessened.” Data leakage happens, for example, where a sales person’s laptop containing key prospect and customer information is damaged beyond repair, or stolen. “With all customer information securely stored in salesforce.com, not on laptops and other mobile devices, intentional and unintentional data leakage is minimized,” Pearson says.

“The main productivity killer as far as correspondence is concerned is retyping information already captured in salesforce.com. This should be an absolute no-no,” says Pearson. “Finding

and eliminating situations where customer data is retyped should be a priority for sales management looking for quick productivity gains.

“And here again, with the data in salesforce.com being automatically available to users in Word through the XpressDox data access tool, there should be no situation that requires a sales person to waste time retyping information.”

In today’s business environment sales professionals are required to produce anything from simple correspondence to complex contracts quicker than ever before. “Not only do their documents need to be professional-looking, complying with the organization’s corporate branding and style, users must also make sure they use the correct letterhead personalized with their contact details. Most importantly, professionals must always reflect customers’ details accurately.

“It’s a tall order. And usually all this needs to be done under extreme time pressure and in a competitive market place,” says Pearson sympathetically.

Pearson explains, “In order for sales reps to close more deals they must become more productive. And assuming they already work long, hard hours during the week—and probably the weekends too—they need technology to help them work smarter and more productively.

“This is where the new, innovative data access technology from XpressDox comes in,” says Pearson. “XpressDox enables sales people to meet the demands on them without even realizing it’s there.”

It is not necessary for users to know how it works for XpressDox to be a tremendous help to them. XpressDox works entirely in the background meaning that sales reps and managers will not need to learn anything new.

“If they can already use Word they can immediately benefit from this new technology. XpressDox works tirelessly in the background. Think of it as the glue between your salesforce.com data and Microsoft Word,” says Pearson.

“Users love it when they simply select a salesforce.com customer record and their document is immediately populated with all the customer’s most recent details. No retyping!

“And at the same time XpressDox effortlessly meets an organization’s corporate image requirements by automatically incorporating important aspects of corporate brand like logo, styles, letterhead, and account manager contact details for example.

“It’s amazing that some prestigious organizations still struggle with something as simple as letterhead standardization. Across a big company there may be literally hundreds of letterheads in operation. Imagine how many of these are out of date,” Pearson says.

With XpressDox there need be only one letterhead in use that caters for all users. In this way a change to an organization’s brand or to its directorship for example, is made once and is then immediately available to all sales people across all departments, offices, and countries.

Multi-office and international companies find this feature of XpressDox indispensable.

Pearson adds, “Other users find the salesforce.com with Word integration very useful for billing and other repetitive administration tasks. For instance, some service departments use XpressDox to generate a list of cases for a specific customer, and from that produce a professional-looking statement of work tickets completed over a period in support of price increases.”

XpressDox integrates salesforce.com CRM data with Word so that this data plus the powerful document automation functionality of XpressDox can help sales reps and managers produce any correspondence from simple letters to complex quotes and contracts in seconds, from the office or on the road.

Get more information by visiting <http://www.xpressdox.com/using-your-salesforce-data-in-microsoft-word/>.

### **About XpressDox:**

XpressDox takes document assembly to a new level. Not only is it one of the most powerful document assembly systems on the market, it is also one of the most versatile. With XpressDox, users author templates in Microsoft Word for use in a wide variety of deployments, from stand-alone documents to multi-template systems, which run on the desktop, over a network, or securely via a browser from anywhere in the world. This means that organizations do not need to deploy any software for template users, which makes installation and administration simpler and less costly. XpressDox even allows templates to be launched from a hyperlink on an organization's web site, allowing customers or prospects to fill in their own forms.

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