

Case Study

Leap Networks Created a Custom Quoting Application without any Coding

The Challenge

Leap Networks is a competitive local exchange carrier (CLEC) and cloud-hosted PBX-VoIP managed-service provider. They provide secure and reliable IP-phone systems to all types of businesses, focusing on the Hospitality industry.

Shannon Ayers is the Director of Sales at Leap Networks. He describes their work, *“Our focus is on the hospitality industry, where we provide IP-phones and other technologies for a hotel’s front desk, administrative areas, and guest rooms. Our system integrates with the hotel’s PMS (Property Management Software). It enables the front desk to provide the highest level of service to their guests while also simplifying the workload on the staff. We service all major hotel brands and numerous boutique & independents hotels”*.

Leap has two unique models that enable hotels to get a new, technically advanced phone system. One is the traditional up-front purchase with a monthly recurring charge for the phone service and support. The second, most popular option is the Subscription model. It is based on the same premise that Microsoft uses with their Office 365 software package. Instead of purchasing and owning the software, then paying an additional fee for upgrades, tech support, and so on, the user pays a small monthly fee that includes all of those items.

Leap does the same with their OverUnity IP-phone system. The business pays a small fee upfront for the installation labor and travel costs; then, a single MRC covers software & security updates, equipment repair and replacement, phone circuits, fees and taxes, and any other item related to the phone system.

Since various criteria are required to provide an accurate quote, it can be challenging to quickly and precisely create an accurate quote for each property.

Shannon elaborates on what Leap needed to provide for their clients and the challenges that came with their product configurations: *“We needed a way to put quotes together quickly and accurately for our prospects. We wanted a quick and easy way to enter the necessary data to create a quote, and we needed immediate output for three different types of purchase models. The pricing calculations and the quote formats produced were different for all three of these. With the purchase models, we have to select the correct number of specific pieces of equipment for that specific property. All properties are different. We wanted this to be automated based on the number of rooms, number and type of phones needed, and other criteria to get the resulting costs and material lists. The required output included the Subscription fee/MRC’s, the installation cost, and two different purchase models with different MRC’s and full equipment lists. There are also different variables based on different phone models and types. Each of these criteria influences pricing.”*

Leap Networks had been using a comprehensive Excel workbook for generating quotes for their clients. Almost anyone can use Excel to create a complex calculation, but there are challenges when information needs to be displayed in a format that Excel cannot.

“When we first started in 2003, we put together an Excel spreadsheet to do the quotes. We’ve made several revisions to it since then. The spreadsheet could do much of the quoting. However, we could not make it print the line item equipment needed. “We were spending an inordinate amount of time cutting and pasting to generate a quote,” explains Shannon. He also adds, “We used other quote programs like QuoteWerks. It’s an excellent program, but it was impossible to set up pricing variables based on the criteria we used. I reviewed over ten quote applications, and none would do what we needed. The spreadsheet got us close to this, but we couldn’t get the output the prospect needed.”

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The Solution

Leap Networks considered multiple options to transform their quote generation process, including hiring developers to custom code this application. Shannon describes their search and the results: *"While we write code for PBX integrations with other applications, we didn't have a person that could be assigned to this project. It became clear that this would be a huge project for us to accomplish, especially within its required time frame. We contacted multiple companies to build an app that would meet our minimum specs. Most of them said it would take at least 3-months and would take a lot of involvement from us. The pricing for the cheapest estimate we got was \$16,000. I mentioned a few 'this would be nice to have' features, and the price increased even more, with the highest quote being \$28,000. We just quit looking for software companies after that. We contacted freelancers but couldn't get a satisfying response from anyone. Prices were all over the board, and it was going to be a major time-drain to give them the information used in building the calculations. We also did not want to spend multiple days having to teach the developers the logic behind the quote process. We knew we had a fairly complex requirement, but we didn't want to spend inordinate amounts of money or time to get the desired results."*

The complexity came from certain conditions based on other variables that were dependent on even more criteria. For example, multiple print documents included certain items and various pricing formulas based on the purchase type and other factors. The calculation logic was already in Excel, but they could not get the required output format. After some research, they found SpreadsheetWeb, which ticked all the boxes for what was needed.

"With SpreadsheetWeb, being able to submit the spreadsheet we used and simply say 'this is the information we want to show' and not having to rewrite everything was very important to us. We made several changes to the spreadsheet during the project, but the

SpreadsheetWeb team was really accommodating". He continues: "Another important point was that the solution is browser-based, meaning that it will work on pretty much any device. It could be kept very simple allowed for BYOD (Bring Your Own Device). We had flexibility on the output forms, and the price was very reasonable".

The Results

Leap Networks was able to go live in the span of a few weeks. The result is a solution that costs them far less than a custom application or attempting to do it in-house.

"I know we saved at least \$13,000 on just the creation of the app compared to the lowest bids we got. Compared to some of the other medium-sized software companies, the savings are well over \$20,000," says Shannon, calling the SpreadsheetWeb approach a *"huge lifesaver."*

"As Director of Sales, I knew we needed a modern, flexible, and professional quote system. Custom coding was not a viable option: If it wasn't for SpreadsheetWeb, I don't think this project would have been approved. We couldn't justify the large price tag of a custom app, and the existing spreadsheet wouldn't work with our new proposal models."

Leap Networks got a chance to field-test the application soon after the project completion. Shannon describes their experience: *"The first major test for the app was at a large national convention we were exhibiting in. A differentiator for drawing buyers to our booth was based on what this app enables us to do: Create an entire proposal and quote in less than a minute. No one else in the industry can do that. We can generate and print the quote(s), special notes, contract paperwork, and the next steps to move forward. Best of all, the sales rep only has to enter the information ONE time!"*

"We also plan on having the app integrate with our CRM platform in the future, thus automating the entire process and virtually eliminating data entry errors. This will improve the way we do business from now on, especially on the

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administrative side of the company. In the future, I plan to have the information our sales force gathers automatically transfer to technical support, installation teams, and the finance department, and vice-versa. This can all be done with existing spreadsheets and no coding, thanks to SpreadsheetWeb.”

“We had a very limited time-frame, minimal budget, and limited staff dedicated to getting this app built and working. My single point of contact at SpreadsheetWeb never got frustrated with my change requests and late calls for help. He explained the requirements from me, the process for completion and made certain we both understood what the final results were going to be and how we would get there. Best of all, he and his team did what they promised. I greatly appreciated that and look forward to working with him on phase two of our application.”

Leap Networks now has a quoting application that provides multiple quote types and formats, is easy to customize by updating their Excel spreadsheet, and is reasonably priced with outstanding technical support. They can now produce accurate quotes from any device with a web browser, not only running complex calculations but managing an entire pipeline of quote generation and customer acquisition – all with zero coding.

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