



Paperless Proposal Case Study

for Mauzy Heating, Air, and Solar

100% Increase in Sales from \$5.7 million in 2014 to \$11.4 million in 2015 using Paperless Proposal.

400% Reduction in time spent creating proposals from 20 mins to less than 5 mins. Spending only 37 hrs per month compared to previously over 150 hrs.

ABOUT PAPERLESS PROPOSAL

Located in San Diego, CA, Paperless Proposal a robust cloud-based business proposal creation, tracking, and management system.

www.paperlessproposal.com 888-972-7375.

ABOUT THE CLIENT

Located in San Diego, CA, Mauzy Heating, Air, and Solar provides both residential and commercial HVAC and Solar energy services.

www.mauzyhvac.com 619-448-9545.

THE SITUATION

To create business proposals to win new clients, the sales team at Mauzy were using a 2-part NCR form that they would complete by handwriting the required information. They would then give the prospective client a copy of the mostly handwritten proposal.

The problems and frustrations caused by using this paper-based system to create and deliver business proposals were as follows:

- Creating proposals was time consuming as it took about 20 minutes to complete a single business proposal. Because they created their proposals in real-time with the prospective client present, the prospect had to patiently wait while the salesperson created the proposal.
- The proposals they created were inconsistent and error prone as the handwriting among Mauzy's sales team varied greatly and their handwriting could be difficult to read.
- Their business proposals did not look professional because much of the proposal was handwritten.
- Their proposals were difficult to track and manage as they were not in an easily accessible, trackable, and manageable digital format.

Matt Mauzy decided that to remain competitive and grow his business, he needed to modernize his system for creating and managing business proposals, and he wanted an all digital solution. After searching Google for business proposal software solutions, Matt found Paperless Proposal.

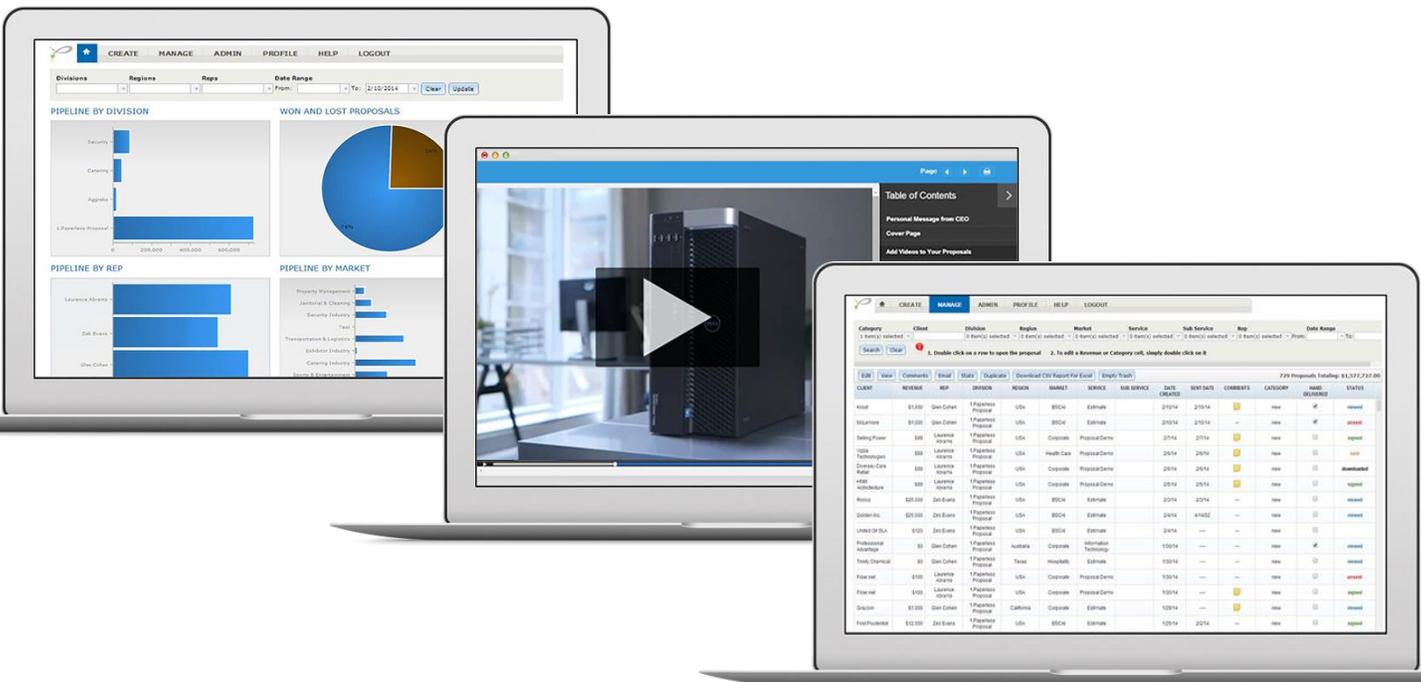
The reason Matt decided to sign-up with Paperless Proposal is because of the professionalism and customer service the Paperless Proposal team provided to him, and how Paperless Proposal helped him create a custom business proposal template to match his exact business needs.

paperless
proposal



THE SOLUTION

Paperless Proposal worked with Matt Mauzy and his team to build a proposal template that matched his business needs. Matt and his team were then trained on how to use the Paperless Proposal system to create, track, and manage all of their business proposals.



THE RESULT

- The time it took for the Mauzy sales team to **create and deliver a professional business proposal to a prospective client was cut by over 400%**. This huge time savings is important because the faster you can provide a prospective client with a quality proposal, the higher the rate of winning new business. The time savings also increases employee productivity. Currently, the Mauzy sales team prepares about 450 proposal per month. By **reducing the time it takes to create a proposal from 20 minutes to less than 5 minutes**, Mauzy's sales team now spends only 37 hours per month creating proposals compared to the over 150 hours per month they spent when they created hand written proposals.
- Because of the precise step-by-step business proposal creation system developed by Paperless Proposal, **proposal data errors were reduced by over 95%**.
- Mauzy's business proposals now had a professional and uniform appearance. Paperless Proposal also made Mauzy's business proposals look much more professional than the proposals of companies they were competing against. This made Mauzy **look more professional as a company and a brand, and it helped them win a significantly higher percentage of new business**.
- Because of Paperless Proposal's real-time proposal tracking and management system, Mauzy's sales team was able to **track the real-time views of every proposal and contact the prospect when that prospect was reading the electronic version of their proposal**. This “wowed” prospects because when they would access the electronic proposal given to them by Mauzy, a Mauzy sales representative would call them.
- Overall, from 2014 to 2015, Mauzy Heating, Air, and Solar increased sales from **\$5.7 million in 2014 to \$11.4 mil in 2015**. Matt Mauzy credits much of their rapid growth to their ability to quickly create, track, and manage professional business proposals using Paperless Proposal software. Matt says that Paperless Proposal software provides his company with a strong competitive advantage.

Why Matt Mauzy of Mauzy Heating, Air, And Solar Recommends Paperless Proposal to Businesses

- ➔ Paperless Proposal provides **great customer service** and they work with me and my team to **build new features** into their software to help my business become more successful. My relationship with Paperless Proposal feels like a partnership.
- ➔ It is easy to customize business proposals so they look exactly how I want them to look for my company's image and brand. It is **easy to upload photos, video, and other file types**. And, whenever I want changes made to my business proposal template, Paperless Proposal always helps me to make the process fast and easy. This helps me to create proposals that have a custom look that makes my business stand out. It is a true differentiator.
- ➔ Their software helps a business create **professional and uniform business proposals that look impressive and provide your business with a competitive advantage**. When you compare a business proposal created with Paperless Proposal to a traditional paper-based business proposal, there is no contest. The business proposal created using Paperless Proposal is going to stand out and help you win a higher percentage of clients.
- ➔ The Paperless Proposal system is very easy to use and I can **train a new rep to use it in less than 30 minutes**. The way their software is setup and guides you step by step in creating a business proposal is very intuitive.



- With Paperless Proposal you will be able to create proposals considerably faster than your current system. Our team went from it taking 20-25 minutes to create a proposal to now taking only about 5 minutes using Paperless Proposal. If you create a large volume of proposals like we do, this will be a tremendous time saver for you. It also allows your sales team to spend more time selling and less time creating proposals.
- Their real-time proposal tracking system is great because it notifies us whenever a prospective client is looking at their proposal. This allows us to know that prospect is available so we can call them to answer any questions they may have. This feature alone has helped us win a higher percentage of new business.
- Overall, using Paperless Proposal has helped us win more business than we normally would have. From 2014 to 2015 our sales increased from \$5.7 million in 2014 to \$11.4 million in sales in 2015. A major part of that growth came from us switching from our paper-based 2-part NCR form system to Paperless Proposal at the end of 2014. Paperless Proposal is going to give you a strong competitive advantage that will help you win a higher percentage of sales. If you want to give your business a competitive advantage, use Paperless Proposal to create, track, and manage your business proposals.



GET A FREE DEMO OF PAPERLESS PROPOSAL SOFTWARE

Contact us to receive a free live demo of Paperless Proposal software at **888-972-7375** or online at paperlessproposal.com