

# TOP 5 PROCESSES

EVERY SALES & MARKETING TEAM SHOULD TRANSFORM IN 2016

## SALES + MARKETING = ONE SHARED GOAL TO INCREASE REVENUE FLOW

As a sales or marketing leader, you're likely facing pressure to gain greater time to revenue and improve customer self-service. With manual, paper-based processes bogging down critical activities, your challenge in 2016 is to automate and streamline those processes to increase efficiency and agility.



## TOP SALES AND MARKETING PROCESSES

1

### CLIENT ONBOARDING & SALES PURCHASE ORDERS

Save time and money in manual processing by using K2 to automate your sales orders.

2

### CUSTOMER SELF-SERVICE

Empower your customers by providing them with self-service tools to place orders and track them, for more visibility and control.

3

### PROPOSAL AND COLLATERAL DEVELOPMENT

Manage your document versions, facilitate review cycles and approval processes, and make sure each document is routed to the right person, at the right time.

4

### SALES CONTRACT RENEWALS

Eliminate extra costs by ensuring that each contract is seen to in a timely manner through automated alerts and approvals.

5

### CAMPAIGN MANAGEMENT

Draw customer information from multiple backend systems into solutions and reports for analysis and performance tracking. Use K2 reporting tools to track messaging, media, ad buys and more.

## WHY DOES THIS MATTER?

SALES AND MARKETING LEADERS ARE OFTEN TASKED WITH HAVING TO:



### Improve customer onboarding

Eliminate paper-based forms to increase efficiency and revenue recognition.



### Collaborate between departments

Streamline customer and vendor contracts for reviews and agreements.



### Convert leads into sales

Leverage enterprise system info and data to give leads the attention they need.



### Improve sales profile processes

Automate this, along with the sales order checklist process, to reduce errors.



### Find cohesive marketing solutions

Support multiple teams with collateral, social, events, lead generation and customer research tracking.



Those who are proactive in leveraging data-driven marketing are three times more likely to achieve competitive advantage in customer engagement/loyalty and almost three times more likely to have increased revenues, according to a survey of 300 U.S. marketing executives conducted by Forbes Insights and Turn.\*

\*<http://bit.ly/1oy5Wkm>

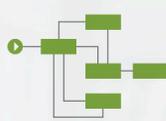
## CREATE YOUR OWN APPS

Take control and deliver automated sales and marketing processes with applications your team creates that use forms, workflow, data and reports. With K2, you can build apps to streamline any process - so you can make data-driven decisions and focus on mission-critical tasks like converting leads to sales.



### FORMS

Quickly and easily create forms for business process applications with no code and no loss of control.



### WORKFLOW

Drive actions, ensure consistency, and increase visibility with automated workflows that connect your people and systems.



### DATA

Use visual tools to build reusable entities that use LOB and Web-based data, regardless of where it lives.



### REPORTS

Track your applications with real-time insight into process status and business performance.

LEARN MORE ABOUT STREAMLINING YOUR SALES & MARKETING PROCESSES AT

[K2.COM/SALES-AND-MARKETING](http://K2.COM/SALES-AND-MARKETING)



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