



Quoting 3CX

Building quotes that win deals

Aims



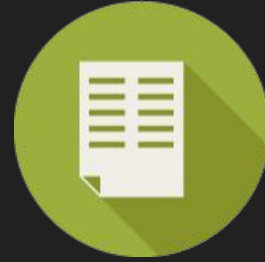
Assess

Customer Needs



Evaluate

Environment



Plan

Your Quotation



Propose

The Right Solution



Assessing Customer Needs



Assessing Customer Needs

Asking these questions will guarantee you understand the key triggers that will motivate your prospect to purchase and identify any potential barriers



Customer Expectations

What are your customers 'non negotiables'?

- Remote Users
- Multiple Office Locations
- Application Integrations
- Lower monthly cost?

Try to distinguish 'must have' features from 'nice to haves'



Evaluate Current Equipment



Phone Lines



SIP Trunks



Devices



CRM



Remote users



Branch offices



Contact Center



Environment

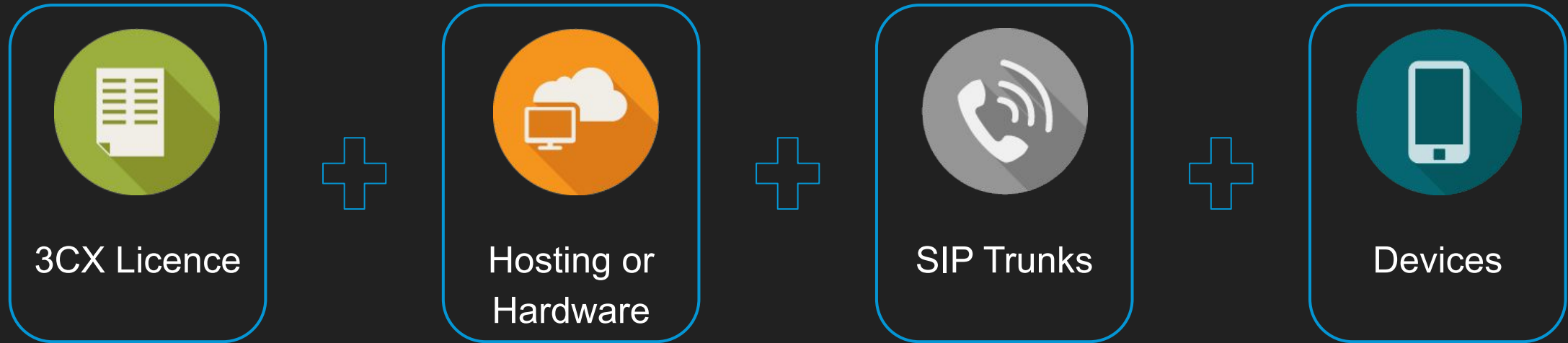


Conducting A Site Survey

- Analog System or IP-based
- Are they VoIP Ready?
- PoE Switches
- Internet speed
- Existing Server Capacity
- Reuse of IP Phones
- Design Call Flow



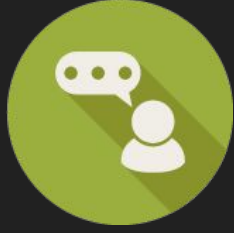
Plan Your Quotation



Additional Services



Training



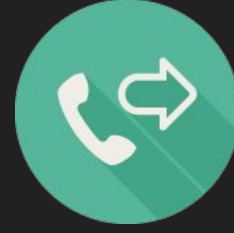
Support
(24/7?)



Installation



Custom
Integrations



Call Flow
Design



Leasing



Submit Your Quotation

Your proposal should include:

1. An introduction to your company and your value proposition
2. An overview of 3CX and our capabilities
3. A justification as to why 3CX is an ideal fit for the SPECIFIC customer
4. System Specifics - call flows, IVRs, integrations, feature required ect.
5. A Fee break down
6. Next Steps/ Timings



The Deployment

- 1 Test first using a NFR
- 2 Deploy offsite
- 3 Test before going live
- 4 Schedule a follow up meeting

Our 3CX Training Certifications contain everything you need to know for a successful deployment. Take them before you start!



Any questions?