



How to Engage & When/Sales Enablement/ Content Mgmt

QUARK: Docurated

Founded in 1981, Quark provides content creation, production, and distribution automation. In 2017 acquired the Docurated sales enablement platform. Quark helps B2B organizations streamline the creation, management, publishing, and delivery of content. Docurated is available as a standalone sales enablement platform or as an integrated solution with Quark's content automation platform.

- Headquarters: Denver, CO
- Other Offices: Dublin, IR; Hamburg, DE; London, GB; Mahali, IN; New York, NY

Pricing/Packaging

SaaS annual subscription with tiered pricing based on licensed seats. Add-on costs for connectors to added content repositories and customizations.

Implementation/Usage

For 300 users, 4-6 weeks. Includes best practices, connector configuration(s), set-up for roles, topics, featured content, etc. Includes dedicated Customer Support Manager.

www.quark.com

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CERTIFIED PROFILE

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Category: How to Engage & When / Sales Enablement/Content Mgmt

PRODUCT

Docurated, available since 2012, helps sales teams find, customize and share content. Marketing can measure content usage and effectiveness. Guided selling and recommendations, supported by AI, give sellers effective content for each prospect and selling scenario. By connecting to existing document stores, users can rapidly implement and scale. Automated application of metadata, version control, and tagging reduce ongoing maintenance requirements for content.

CUSTOMER BASE

Number of Customers: 200

Licensed Seats: 250,000

Notable Docurated Customers: Diebold, Riverbed Technologies, Rodan + Fields, Valassis

FOCUS INDUSTRIES & GEO

Financial Services
Distribution
Manufacturing

Tech
Healthcare,
Medical Devices

Geos:
North America
EU/EMEA
AUS/NZ

CHALLENGES ADDRESSED

- Find the right content via search and recommendations.
- Reduce sales cycles by matching the right content to the opportunity at every stage.
- Shorten new hire ramp time by guiding reps to the right content.
- Increase buyer engagement by ensuring only successful content used.
- Improve interaction outcomes by leveraging content that works.
- Strengthen seller skills by integrating with sales training and LMS solutions.
- Reduce the number of content platforms via a single portal to find and use content.
- Increase win rates by using predictive content proven to work in similar opportunities.

KEY PERFORMANCE INDICATORS

- KPI 1: Reduce time sellers spend searching for content.
- KPI 2: Reduced sales cycles with targeted content progressing opportunities faster.
- KPI 3: Increase win rates with content that has been proven to work in the past.
- KPI 4: Reduce marketing time on ad hoc requests by supporting content customization by sellers.
- KPI 5: Better compliance through tracking content usage by sellers.



KEY CAPABILITIES

- ✓ Access/Assemble content during live presentation.
- ✓ Ensure the sales process, and specific steps followed.
- ✓ Persona-based messaging and content.
- ✓ Recommended sales actions based on best practices and analytics.
- ✓ Facilitate online content selection by sellers.
- ✓ Instant online meetings from within Docurated.
- ✓ Know when buyers engage with emails and content.
- ✓ Know which content progresses deals.
- ✓ Present, show product.

Content customization

- Incorporate interactive HTML5 tools such as ROI calculators.
- Sellers assemble content objects (with permissions) and export to PowerPoint or PDFs.
- Direct editing, with versioning and change management, from within data sources and productivity tools (i.e., Office).
- “Wizard” interface to simplify creative customization, governance and updating of PowerPoint decks (SmartDecks).
- Seller edited content versioning with review/approval workflows.
- All assembled content.

Content Management

- Fully indexes all content, identifies duplicates and latest versions.
- Scans content (PPT, docs, PDFs) for keywords and breaks down to individual content objects. Metadata and tagging for search and recommendations.
- Content tags can be batch updated.
- Tags can include CRM fields.
- Based on activity, content recommendations via AI support.
- Content can include videos, and HTML5 applications including related engagement/tracking info.
- Publish/expire dates.

Live Presentations

For face-to-face and screen sharing, including on-the-fly assembly, and tracking (time spent, which slides, etc.) when using Docurated to present.

Notifications/Distribution to Sellers

Notifications of new content based on role on Docurated “home page” and emails. Alerts when content in collections is updated and new content available and recommended based on opportunity analysis.

Recommendations/Guided Selling

Based on any relevant CRM-field, seller demographic (role, time in the role, if certified, location, etc.). Can be gated to require viewing of internal content before using with a buyer. Can include descriptions, how to use, usage and other analytics.

Social Selling Integration

Facebook: Shares, views, likes with a dedicated analytics dashboard.

Analytics

Track seller and buyer engagement and usage with content, emails, recommendations, etc. Map to CRM fields, see exceptions (i.e., content used out of stage). Usage for contact and account, seller, and team.

AI/Machine Learning

Via integration with email and CRM, AI filtering uses data on how various content has performed regarding engagement, sales stage and more. Inputs basis for predictive recommendations for similar deals. Sellers can see these recommendations in the CRM and email. Requires time to gather enough data.

Administrative Portal

Controls for content collections, preventing sellers from deleting certain clauses or slides (useful for highly regulated industries). Set user roles, teams, recommended content, branding and other customizations.

INTEGRATIONS

- CRM: Salesforce (as a tab, SFDC search and recommended content on opportunities).
- Business Intelligence: Tableau included, one user. Added licenses for a fee or, if an existing customer, integrate with customer’s Tableau instance. Tableau reports available to all users.
- Data Repositories: Any named network attached drive, Box, Confluence, Documentum, Egnyte, Google Drive, Infostoria, Kentico, OneDrive, SharePoint, Vault Alfresco.
- Email: Exchange, Gmail.
- Productivity: Office 365. Adobe Acrobat.
- Training: Brainshark, MindTickle (linking to).
- Other: Quark’s content automation platform for content production.

PARTNERS/CHANNELS

Supports multiple portals and roles, permissions, etc. for use with business partners.

SUPPORT

Customer Support: Phone, Email, Chat, Support Portal available 24/5 and premium for 24/7.

Device/WebSupport:

- Web: Chrome, Internet Explorer, Firefox, Safari.
- Mobile/Tablet: Android, IOS.

Language Support:

- User Interface: English, customizable by users.
- Content: Wide range for scan and search.