

# BUSINESS ACUMEN

**Wikipedia:** acu.men : **keenness and quickness in understanding and dealing with a business situation in a manner that is likely to lead to a good outcome.**

- ❑ **PROBLEM:** The client is venting about issues with paying bills, but you don't know how "invoice-processing" works.
- ❑ **OPPORTUNITY:** If you did, the fit between your solution and their problem would become evident.
- ❑ **SOLUTION:** Take a two-day course and upgrade your working knowledge so you can ask the right questions [with confidence].
- ❑ **COMMENT:** If you sell ECM solutions, you need to know **HOW** they help, not what they can do!

## Verticals covered:

**Education, Legal, Healthcare, Insurance and Financial**

Every company pays bills, hires staff and deals with insurance. Learn specifically where the pain is when they manually create a task, assign it, distribute it, modify it, track it, complete it, and archive it. We will explain [in great detail] the problem areas, that can become opportunities! Then you will better understand how your ECM solution can address these issues, and bring positive ROI in days/weeks.

**Once you know, your eyes become open, and several things happen: New opportunities become evident. You expand existing clients, and you start to create residual income!**



## Requested by dealers and OEM's alike!

It was said "Business owners would rather have a conversation about what slows-down office efficiency, rather than a product feature data-dump!"

A common theme is that reps struggle in this area, causing missed opportunities. This is exactly why we created the industry's first Business Acumen course.

## Learn to speak with confidence and stop leaving money on the table!

Attend this class and we will teach you, show you, and quiz you, until you know the words they will use and how their process works. Then, and only then, will you be in an expert position to recommend a solution that actually fits and gets the follow-on sale!

## Benefits of this course:

- ✓ INCREASE YOUR VOCABULARY
- ✓ BETTER UNDERSTAND THEIR PAIN
- ✓ GAIN HIGHER WORKING KNOWLEDGE
- ✓ SPEAK WITH CONFIDENCE
- ✓ SELL MORE HARDWARE/SOFTWARE/ PROFESSIONAL SERVICES
- ✓ Read more about it on the back >>>



**Signup  
and sell more!**

# Course Overview

**Audience:** Account Reps, Solution Specialists, Analysts, Sales Managers, Consultants

## Course Contents:

### The problem

- Present state, client workflows

### Automation in the workplace

- Automation opportunities
- BPI, BPM, BPO, ROI for going digital
- Resistance to automation
- Solutions - Past and Present
- Futuristic Forecast

### Business Workflow - 101

- Healthcare - Patient Records
- Banking - Mortgage processing
- Legal - Contract Management
- Education - Student Records
- Finance - Invoice Processing

### Mapping needs to solution capabilities

- Purpose of Needs Assessment
- Typical, not solution-specific

### What's in it for me?

- Example business case, with ROI and GP estimates
- Residual Income
- Uplift vocabulary (speak with confidence)
- Consultant vs. Vendor

### Sales Training

- Sales vs. free-consulting
- How to 'bird-dog' opportunities
- What questions to ask, and what not to say!
- Understand the "Decision - Tree"
- Discussions: OPEX vs. CAPEX

## Case Studies:

- Patient Records
- Mortgage Processing
- Legal Correspondence
- Property Management - Leases

## Take-away hand-outs:

- Copy of presentation
- Workflow diagrams
- Sample assessment with Business-case ROI
- Homework, Vocabulary list, Sales Tips

## Pre-Training (delivered online):

- **Introduction to Workflow Automation - Part One**
  - Purpose of the class
  - Introduction to benefit of automation
  - Complete direction of a case-study
  - (Approximately two-hours)

## Post-Training (optional)\*:

- **Introduction to Workflow Automation - Part Two**
  - Workflow using AI (Artificial Intelligence)
  - Advanced Data Capture
  - Big-data analytics
  - Basics of Integration

**Prerequisites:** A strong desire to provide an ECM solution that "fits" [while generating great income].

**Delivery Format:** Online pre-training (2 hours), then two-day classroom. Optional, 4 hour online post training.

**Location:** Public-classes in Sturbridge, MA. Optional private-classes at your location.

**\*Introduction to Technology - Part Two is a separate training course and is suggested as post-training for those interested in further advancing their knowledge of ECM technologies.**



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