


Salesbuildr

We help your sales process become best in class.

Built for growing MSPs.



Sales Pipeline



Portfolio



Templates



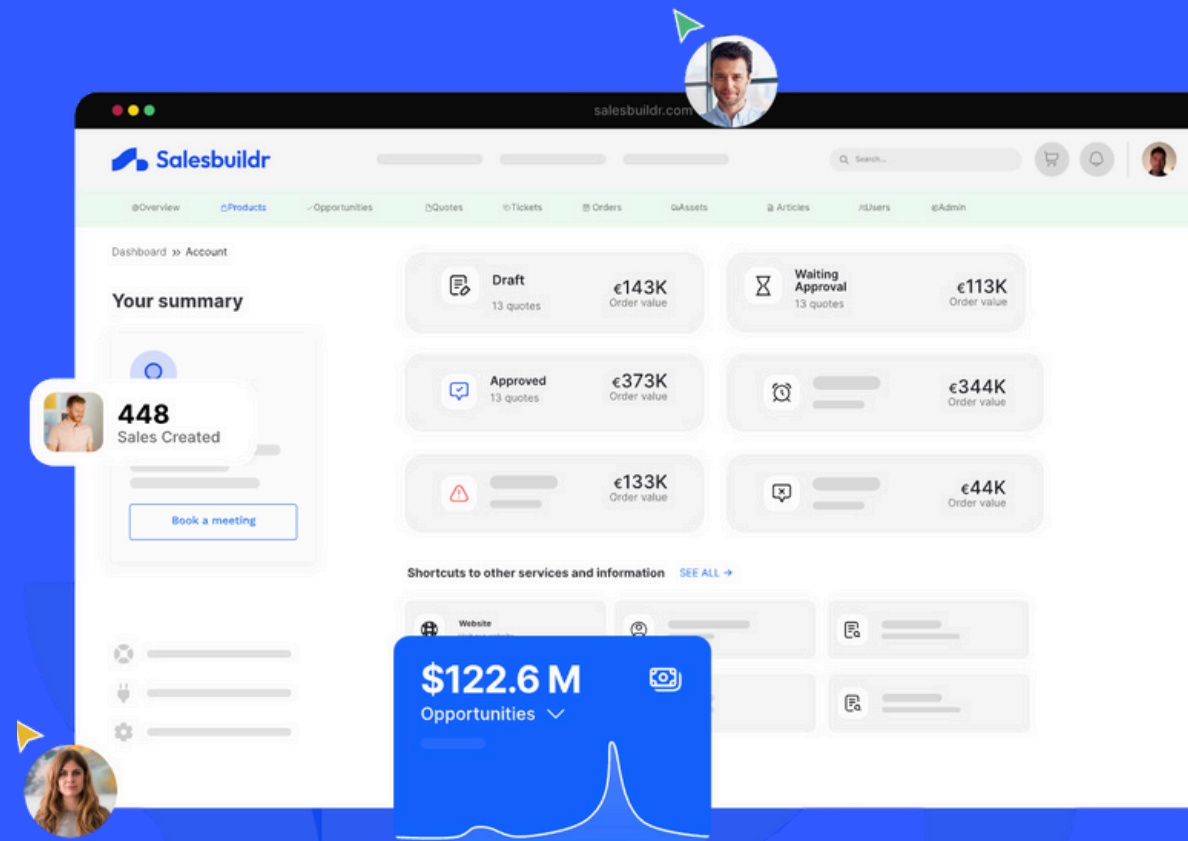
Compliance



Proposals



Whitespace



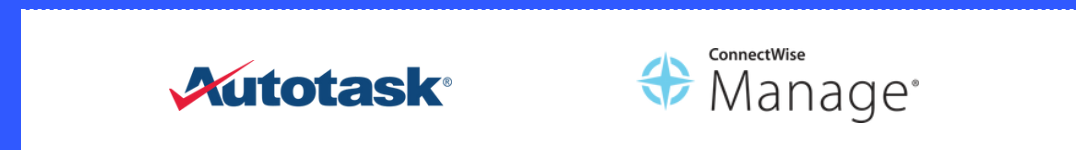
Storefronts



CRM



Orders



Autotask **ConnectWise Manage**

Salesbuildr



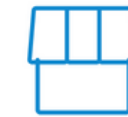
CRM

A centralised overview of companies, contacts, related data points and actionable insights, in sync with your PSA.



Sales Pipeline

A comprehensive overview of sales opportunities within your customer landscape. Why? Learn from the past and manage future expectation?



Storefronts

Streamlined customer experience and automated sales process for standard products and services to enable growth and scalability.



Whitespace

View and act upon upcoming contract renewals, spot under billing, visualise service gaps and identify expansion opportunities.



Templates

Professional and consistent sales collateral creation to improve the quality of proposals and contracts.



Orders

Conversion of approved proposals into purchase orders and streamlined procurement processes to reduce errors and improve efficiency.



Portfolio

A standardised sales portfolio where you can manage everything you sell based on rules and automation.



Proposals

Create interactive quotes, proposals, and contracts to save time and reduce manual data entry.



Compliance

Ensures company-wide standardisation and compliance using business rules, permissions, approval workflows and audit trails.

Salesbuildr Overview

Distributors

Salesbuildr

 CRM	 Portfolio	 Sales Pipeline
 Templates	 Compliance	 Proposals
 Whitespace	 Storefronts	 Orders

PSA

Accounting

Sales Pain Points Bingo card

You feel the negative value and impact of these pain points get bigger as your organisation scales.

This leads to:

- Lack of insights
- Inefficient allocation of resources
- Missed opportunities
- Inaccurate proposals
- Frustrated employees
- Underwhelmed customers
- Broken processes

Industry reports say that a full time sales employee spends around 40 hours per month on administrative sales tasks.

CRM

Not designed for sales and missing segmentation

Portfolio

No rules, no standardisation, inaccurate pricing

Pipeline

Inaccurate forecasting due to missing data

Templates

Hard to find, outdated and inconsistent

Proposals

Takes too much time, feels outdated

Insights

No insights on service penetration and opportunities

Outcomes when using Salesbuildr

We see the positive value and impact of these outcomes get bigger as your organisation scales.

This leads to:

- Actionable insights
- Efficient allocation of resources
- More opportunities
- Accurate proposals
- Happy employees
- Impressed customers
- Streamlined processes

Salesbuildr saves around 20 hours per team member on a monthly basis.

CRM

A centralised and segmented overview

Portfolio

A standardised portfolio based on rules that auto updates

Pipeline

A structured overview of past, present and future

Templates

On-brand, consistent and compliant templates and building blocks

Proposals

Quickly and easily generate professional and interactive quotes

Insights

Identify opportunities, upcoming renewals and underbilling

Customer Relation Management

A centralised overview of companies, contacts, related data points and actionable insights, in sync with your PSA.

- Create, view and manage companies and contacts.
- Push updates to Autotask or ConnectWise.
- Set business rules for companies and contacts.
- Track sales-related information about opportunities, proposals, contracts and commercial performance.
- Use custom labels to segment companies and contacts.
- Automatically enrich data points for customers and contacts.

The screenshot displays the Salesbuildr CRM dashboard. At the top, there is a navigation bar with the Salesbuildr logo, user information (Microsoft 365, HP Elitebook, KPN), and a search bar. Below the navigation bar, there are tabs for Dashboard, Categories, Products, Opportunities, Quotes, Companies, Contacts, Users, and Admin. The main content area is divided into several sections:

- Actions:** Includes buttons for "Manage your profile", "Log out", "Quick Quote" (Create a new quote based on default settings. (Q)), and "New Product" (Quickly create a new product. (P)).
- Your account manager:** Features a profile card for Victor Raessen, Founder of Salesbuildr, with a LinkedIn icon and contact information. It includes buttons for "Book a meeting" and "Chat with me".
- Your summary:** A grid of metrics including:
 - Opportunities created: 160 (Year to date)
 - Opportunities closed: 69 (Year to date)
 - Conversion rate: 43% (Year to date)
 - Draft: 241 quotes, €3M Order value
 - Expired: 28 quotes, €49k Order value
 - Declined: 2 quotes, €6k Order value
 - Waiting approval: 2 quotes, €220 Order value
 - Waiting your approval: 0 quotes
 - Approved: 0 quotes (-100% vs last month)
- Links:** A "SEE ALL" link with a right-pointing arrow.



Whitespace Analysis

View and act upon upcoming contract renewals, spot under billing, visualise service gaps and identify expansion opportunities.

Advanced

- Identify service gaps and opportunities.
- Create and send personalised proposals.
- Spot and act upon expiring contracts.
- Expose under billing for contract line items.
- Advanced filtering options.

Premium

Everything in Advanced, plus:

- Save notes on gaps.
- Build customer lists based on profiles.
- Send email campaigns to customer lists.
- Get insights into high performers and profit.

	Monthly Revenue	Azure Consumption	Co-Managed	Connectivity	Continuity	HaaS	IaaS	M
24Connect BV	€0.00							
ABLE Manufacturing	€720.00							
Banco do Brasil Seguridade	€0.00							
Bart van den Burg Web Development	€0.00							
Burgov Parent Company	€0.00							
Child Company	€0.00							
CloudPlusPlus	€3,002.88	€100.00	€299.00	€500.00	€100.00		€250.00	
CloudPlusPlus 2 Jon	€0.00							
Customer A	€0.00							
Customer B	€0.00							
Customer C	€0.00							
Customer D	€0.00							
Customer E	€0.00							
Customer F	€1,335.00			€335.00				
Customer G	€2,151.88	€100.00	€299.00	€500.00	€100.00	€149.00	€250.00	
Customer H	€0.00							
Knisper	€0.00							
Leglvision Technologies	€0.00							



The Whitespace module is available for Salesbuildr Advanced and Premium subscriptions using Autotask and ConnectWise Manage.

Sales Pipeline Management

A comprehensive overview of sales opportunities within your customer landscape.

- Automatically updates stage, status and order values based on rules and what's inside the proposal.
- View, track and manage sales opportunities based on stage, status, customer, owner, source, category, close date and expected close date.

The screenshot displays the Salesbuilder dashboard interface. At the top, there is a navigation bar with the Salesbuilder logo, user information (Microsoft 365, HP Elitebook, KPN), and a search bar. Below the navigation bar, there are several menu items: Dashboard, Categories, Products, Opportunities, Quotes, Companies, Contacts, Users, and Admin. The main content area is divided into several sections:

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Sales Portfolio Management

A standardised sales portfolio where you can manage everything you sell based on rules and automation.

- Provides clarity and simplification across teams, including marketing.
- Ensures standardisation of cross and upsell.
- Auto updates based on distributor feeds.
- Auto calculates sales prices based on rules.
- Shortens training time for new employees.
- Keep track of individual product performance.
- Setup standard descriptions that show up when you insert items into a proposal.
- Updates are pulled from and pushed into your PSA.



Name	Markup	Products	Add-ons	Hidden	Shipping
Installation	25.00%	5	0	No	No
Managed Services	20.00%	2	0	No	No
Labour	20.00%	4	0	No	No

Name	Markup	Products	Add-ons	Hidden	Shipping
Microsoft 365	25.00%	2	0	No	No
Operating System	25.00%	1	0	No	No
Security	20.00%	3	0	No	No

Name	Markup	Products	Add-ons	Hidden	Shipping
Apple laptops	20.00%	5	0	No	No
Bundles	20.00%	2	0	Yes	No
HP Elitebooks	20.00%	5	4	No	No
HP Laptops	20.00%	9	5	No	Yes



 Autotask®

 ConnectWise Manage®

Advanced Template Library

Professional and consistent sales collateral creation to improve the quality of proposals and contracts.

- Ensures templates are centralised, sorted, organised by labels and easy to maintain.
- Ensures company-wide standardisation and compliance using rules and audit trails.
- Building blocks can be set up to include products and services, attachments, datasheets and specific business rules.
- Create building blocks for all sales collateral and link them to templates:
 - Product descriptions
 - Service descriptions
 - Customer context
 - Outcomes
 - Case studies and testimonials
 - Terms and conditions

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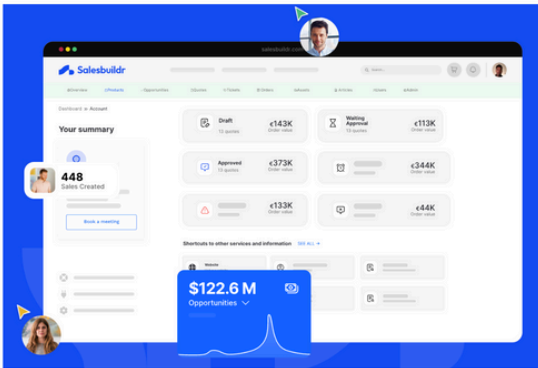
Easy to use Proposal Editor

Create interactive quotes, proposals, and contracts to save time and reduce manual data entry.

- Fast and easy to use drag-and-drop editor that generates great looking and interactive quotes, proposals or contracts.
- Contains up to date pricing and information and removes the need for manual data entry.
- Automatically keeps your PSA and sales pipeline up to date based on what's inside the proposal.
- Passes through your internal approval process when preconfigured conditions are met.
 - Order value
 - ARR
 - Specific services
 - Specific opportunity categories
 - Specific team members

Salesbuildr

Sales and revenue operations for growing MSPs



Autotask | Manage | Dynamics 365

Salesbuildr

Proposal

MSP Navigator
Victor Raessen
Jan den Haenstraat 10-A
1056WD Amsterdam
NL

Amsterdam,

Dear Victor,

Great to see your interest in Salesbuildr. Based on our conversation, Salesbuildr seems to be a great fit for your needs.

In this proposal

In this proposal, I will show you how our quotation software seamlessly aligns with your ambitions and goals. Attached you can read the steps how we will optimise Salesbuildr for your organisation to maximise value.

Next steps

If you want to start creating winning proposals without the friction, please sign this proposal.

I look forward to our upcoming partnership. Warm regards!

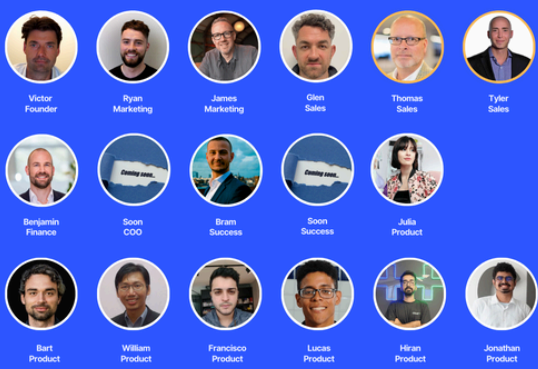
Victor Raessen
victor@salesbuildr.com

Salesbuildr Subscription

Select 1 option

Product info	Quantity	Price (month)	Total (month)
<input type="radio"/> Deselect			
<input checked="" type="radio"/> Salesbuildr Advanced - 4 users included We enter into a 12-month contract. After that, you can cancel the subscription on a monthly basis. The advanced license comes with 4 users included. You can add additional users for € 50 per month.	1	€349.00 / license	€349.00
Product add-ons			
Salesbuildr advanced onboarding	1	€149.00 / item	€149.00
<input checked="" type="checkbox"/> Advanced Self Service Storefront	1	€149.00 / license / month	€149.00 / month
<input type="checkbox"/> Additional advanced user	4	€39.00 / user / month	€156.00 / month
<input type="radio"/> Salesbuildr Premium - 4 users included We enter into a 12-month contract. After that, you can cancel the subscription on a monthly basis. The premium license comes with 4 users included. You can add additional users for € 70 per month.	1	€499.00 / license	€499.00
Product add-ons			
Salesbuildr premium onboarding	1	€199.00 / item	€199.00
<input type="checkbox"/> Additional premium user	1	€79.00 / user / month	€79.00 / month
<input type="checkbox"/> Premium Self Service Storefront	1	€249.00 / license / month	€249.00 / month

Team Salesbuildr



Victor Founder, Ryan Marketing, James Marketing, Gert Sales, Thomas Sales, Tyler Sales, Benjamin Finance, Soren COO, Brian Success, Soren Success, Julia Product, Bart Product, William Product, Francisco Product, Lucas Product, Hiran Product, Jonathan Product

Inside Salesbuildr: Victor Raessen's Journey to Redefine MSPs Through...
MEET THE FOUNDER

Salesbuildr

Advanced and Premium features

Advanced Service bundles Salesbuildr lets you sell the packages that your customers are looking to achieve, without adding complexity. Package any combination of hardware, software, services and labour into one single line item on a quote which includes them all, regardless how items are priced.	Advanced Up and cross sell Configure mandatory and optional add-ons for products and services in your catalog. This enables you to capture more revenue and margins and prevent misses or omissions in the sales process.	Premium Roles and permissions Ensure consistent separation of functions and access to data and resources.	Premium Advanced importer Whether you're dealing with project calculations, supplier quotations, special bids, build-to-order proposals, custom priced bids, customer specific pricing books, or license renewals, our import workflows have got you covered.	Premium Advanced Approvals Salesbuildr's Advanced Approvals feature allows users to set up complete approval workflows for quotes and opportunities. This feature enables businesses to ensure that quotes align with company policies and standards.
Premium Data export Salesbuildr's export functionality allows users to easily extract valuable data from the platform for further analysis or integration with other systems. This feature is available for the Sales Platform, Companies, and White Space Modules.	Premium Inventory Sync This integration ensures that the most up-to-date inventory information is always available in Salesbuildr without the need for manual updates.	Premium API Access Salesbuildr's API Application Programming Interface access enables businesses to integrate the platform seamlessly with their existing systems and workflows.		

Salesbuildr

Success Stories



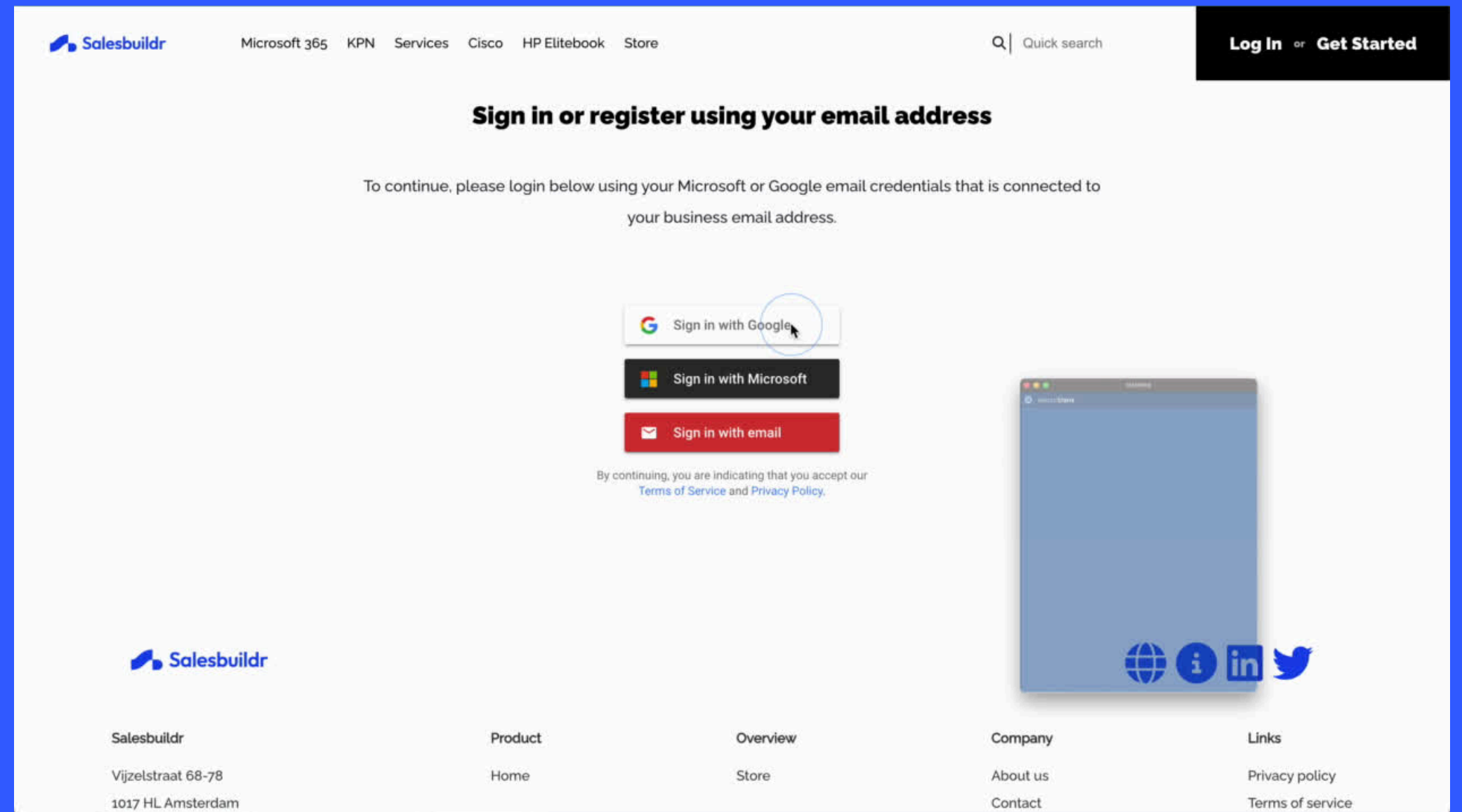
Central Technology, Pioneer 360, G0sensit, i4, BMP Datapartners, Fancit, Campai, vanRoey, Expro IT, PartnerUP, Arcus IT, ECX Business Solutions

Salesbuildr

Self Service Storefronts

Streamlined customer experience and automated sales process for standard products and services to enable growth and scalability.

- Streamlines the customer experience and automates the sales process for standardised products and services.
- Support for customer-specific portfolios, configurations, pricing and approval workflows.
- Available 24/7/365 to enable growth and scalability.
- Auto generates opportunities and quotes and pushes them into your PSA with all relevant details.



Purchase Order Automation

Conversion of approved proposals into purchase orders and streamlined procurement processes to reduce errors and improve efficiency.

- Convert approved proposals into post sale tickets with charges in Autotask.
- Create purchase orders in Autotask that are linked to the post sale ticket.
- Generate and electronically send purchase orders to your connected distributors from Salesbuildr using their API.
- Keep track of the status of the PO from your distributor, receive notifications.

[OPEN THE DETAILED SLIDEDECK WITH MORE INFORMATION](#)

The screenshot displays the 'Procurement' section of the Salesbuildr interface. It features a navigation bar with options like 'Dashboard', 'Favorites Lists', 'Categories', 'Products', 'Opportunities', 'Quotes', 'Procurement', 'Companies', and 'Contacts'. A search bar is located in the top right. Below the navigation, there's a 'Pending items' section with a 'Create order' button and a filter dropdown for 'Distributor' (Ingram Micro (41) and Travion (2)). The main area shows a table of pending orders with columns for 'Created', 'Number', 'Distributor', 'Status', and 'Actions'.

Created	Number	Distributor	Status	Actions
4/29/24, 11:07 AM	1025	Ingram Micro	PENDING	
4/29/24, 10:52 AM	2024-0042	Travion	PENDING	
4/17/24, 6:28 AM	1024	Ingram Micro	PENDING	
4/15/24, 11:09 AM	2024-0040	Travion	PENDING	
4/15/24, 8:42 AM	2024-0039	Ingram Micro	PENDING	
4/15/24, 7:31 AM	2024-0038	Ingram Micro	PENDING	
4/14/24, 9:09 AM	1023	Ingram Micro	PENDING	
4/14/24, 9:05 AM	1022	Ingram Micro	PENDING	
4/4/24, 11:29 AM	1021	Ingram Micro	PENDING	

The Purchase Order module is available for Autotask customers using Ingram Micro. The ConnectWise Manage release is planned for Q4.

Advanced & Premium Features

[LEARN MORE](#)

Advanced

Service bundles

Salesbuildr lets you sell the outcomes that your customers are looking to achieve, without adding complexity.

Package any combination of hardware, software, services and labour into one single line item on a quote while pushing them as separate line items into your PSA.

[LEARN MORE](#)

Advanced

Up and cross sell

Configure mandatory and optional add-ons for products and services in your catalog.

This enables you to capture more revenue and margins and prevent mistakes or omissions in the sales process.

[LEARN MORE](#)

Premium

Roles and permissions

Ensure compliant separation of functions and access to data and resources.

[LEARN MORE](#)

Premium

Advanced importer

Whether you're dealing with project calculations, supplier quotations, special bids, build-to-order proposals, custom price lists, customer-specific pricing books, or license renewals, our import workflows have got you covered.

[LEARN MORE](#)

Premium

Advanced Approvals

Salesbuildr's Advanced Approvals feature allows users to set up complex approval workflows for quotes and opportunities.

This feature enables businesses to ensure that quotes align with company policies and standards.

[LEARN MORE](#)

Premium

Data export

Salesbuildr's export functionality allows users to easily extract valuable data from the platform for further analysis or integration with other systems.

This feature is available for the Sales Portfolio, Companies, and White Space modules.

[LEARN MORE](#)

Premium

Inventory Sync

This integration ensures that the most up-to-date inventory information is always available in Salesbuildr, without the need for manual updates

[LEARN MORE](#)

Premium

API Access

Salesbuildr's API (Application Programming Interface) access enables businesses to integrate the platform seamlessly with their existing systems and workflows.

Onboarding flow

Onboarding timeline is around 1 to 2 weeks for small to midsize MSPs

Read the onboarding checklist to understand the pre-onboarding requirements

Pre-onboarding

Steps you take in 1 hour

- Launch your instance
- Connect and sync your PSA
- Email proposal templates
- Request distributor credentials
- Configure e-mail domain
- Book 1st onboarding call
- Watch the training video

1st Onboarding call

Steps we take together 1 one hour

- Verify your email settings
- Review your portfolio
- Enable dynamic pricing
- Review templates
- Review e-mail templates
- Review best practice settings
- Create your first proposals

2nd Onboarding call

Steps we take together 1 one hour

- Review any questions
- Go over tips and tricks

Onboarding Done

You can now user Salesbuildr and rely on:

- Email support
- Chat support
- Jump on calls



Onboarding timeline is around 2 to 6 weeks for midsize to large MSPs

Read the onboarding checklist to understand the pre-onboarding requirements

Pre-onboarding

Steps you take in 1 hour

- Launch your instance
- Connect and sync your PSA
- Email proposal templates
- Request distributor credentials
- Configure e-mail domain
- Book 1st onboarding call
- Watch the training video

1st Onboarding call

Steps we take together 1 one hour

- Verify your email settings
- Review your portfolio
- Enable dynamic pricing
- Review templates
- Review e-mail templates
- Review best practice settings
- Create your first proposals

2nd Onboarding call

Steps we take together 1 one hour

- Review advanced features
- Review any questions

3rd Onboarding call

Steps we take together 1 one hour

- Review any questions
- Go over tips and tricks

Onboarding Done

You can now user Salesbuildr and rely on:

- Email support
- Chat support
- Jump on calls



We help you become best in class at your sales game

- Build based on feedback
- We remove friction
- We add simplicity



Victor
Founder



Ryan
Marketing



James
Marketing



Glen
Sales



Benjamin
Finance



Martijn
COO



Bram
Success



Mike
Success



Bart
Product



William
Product



Francisco
Product



Lucas
Product



Joao
Product



Jonathan
Product



Julia
Product

Next steps

Read more on the [website](#)

Start a [free trial](#)

Visit the [knowledge base](#)

Book a meeting for a [demo](#)

The screenshot displays the Salesbuilder dashboard interface. At the top, there is a navigation bar with the Salesbuilder logo and a search bar. Below this is a menu with options: Overview, Products, Opportunities, Quotes, Tickets, Orders, Assets, Articles, Users, and Admin. The main content area is titled 'Dashboard >> Account' and features a 'Your summary' section. This section includes several cards: 'Draft' (13 quotes, €143K Order value), 'Waiting Approval' (13 quotes, €113K Order value), 'Approved' (13 quotes, €373K Order value), and another card with a clock icon (€344K Order value). A callout box on the left shows '448 Sales Created' with a 'Book a meeting' button. Below the summary is a 'Shortcuts to other services and information' section with a 'SEE ALL' link. A prominent blue callout box in the foreground displays '\$122.6 M Opportunities' with a line graph icon. The dashboard also includes a sidebar with a 'Book a meeting' button and a user profile picture in the top right corner.