



# INNOVATE 2018

Customer Conversations Made SMARTer

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# SmartCORR™ for Salesforce: Engaging Customers Can't Get Any Easier!

Phil Rowlinson, VP, Global Head of Sales Operations for Merrill Corporation

**SMART**  
COMMUNICATIONS™

Confidential

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**Simpler, Faster, Smarter:**  
**Changing the way**  
**Merrill Corporation works!**

Confidential



# MERRILL CORPORATION

CAPITAL TRANSACTIONS

MERGERS AND ACQUISITIONS

REGULATORY DISCLOSURE FOR  
CORPORATIONS AND INVESTMENT MANAGEMENT

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The most important company you never  
heard of

# MERRILL CORPORATION: A JOURNEY



*“Very rarely do you take a company that’s 50 years old and reinvent that company around an investment in a new technology platform.*

*To be able to transform from our early days of being a financial printer, into a SaaS based technology company enabled by incredible service and relationships with our clients. That is a remarkable transformation that very few companies have ever been able to execute.*







*But that is precisely what we have done at Merrill.”*

*- Rusty Wiley, CEO, Merrill*



- Restructured our sales organization
- Built out a new product development team
- Complete revision of our product technology stack
- Automating our Quote to Cash Process
  - Salesforce/CPQ
  - Integration with Merrill Platform
  - Aria Billing
- Launched DatasiteONE platform

# DATASITEONE MIRRORS HOW WE ENGAGE

-  **Speed**      Quote to project delivery in minutes
-  **Simplicity**      E-Signature, Online Order, follow up orders
-  **Security**      Highly confidential interactions. Privacy and security first!
-  **Service**      Real people. All the time!
-  **Innovation**      Products and services that are changing the way the industry operates
-  **Expertise**      Global leader in the Industry, managing 6,000 projects

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Where does  
SmartCORR™ for  
Salesforce fit in?



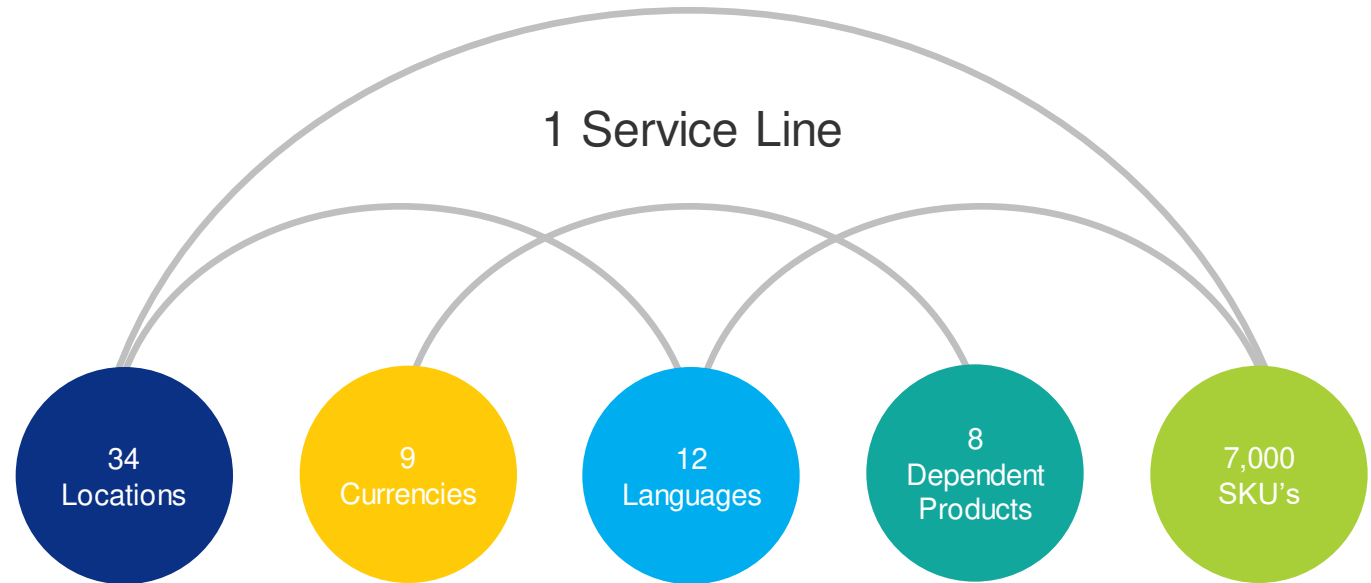
## Complexity is unavoidable in a Global Market, even for 1 Service offering

Multiple pricing strategies when coupled with language, currency, legal entity, products, optional services creates a situation where there are 13.2M different output documents.

Until recently, every contract was uniquely and manually created

22,000 quotes annually

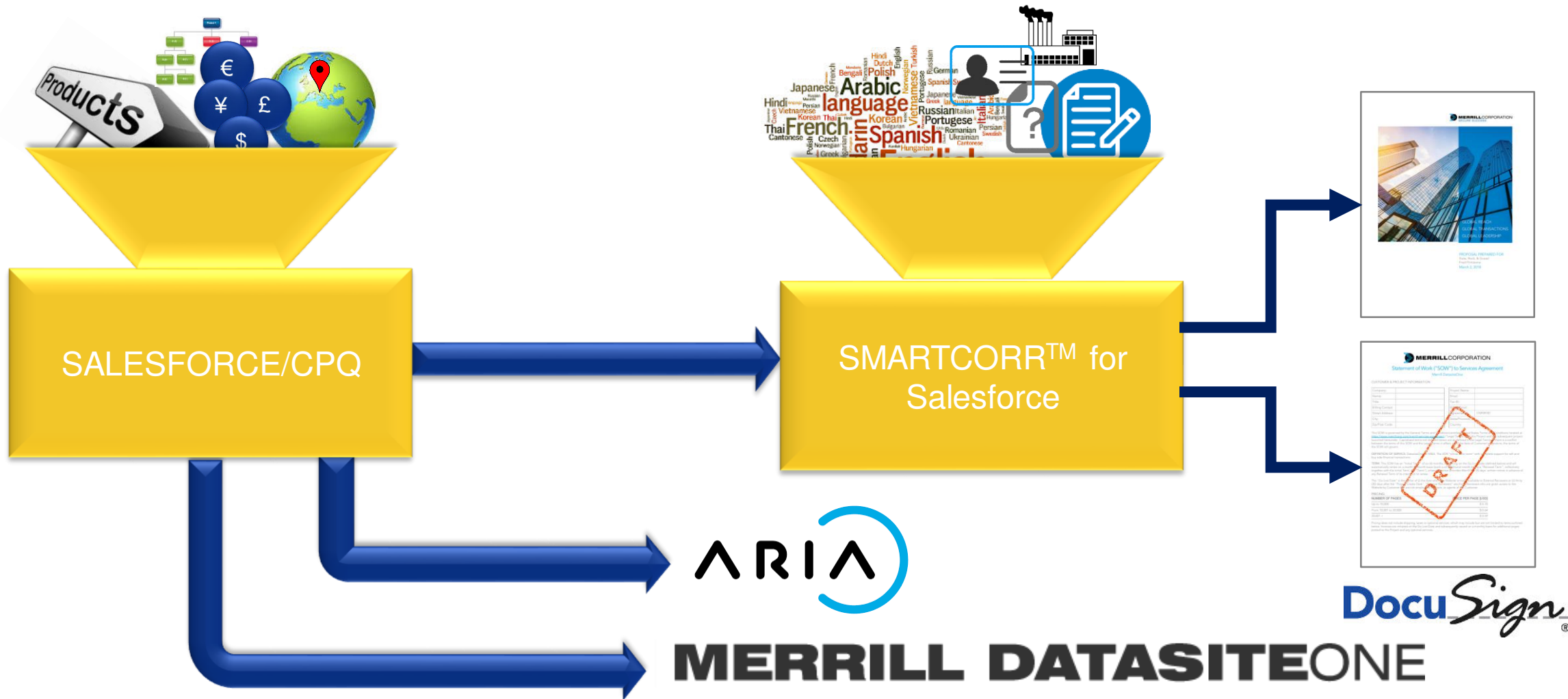
**3 More Service lines coming!**



### Market sensitivity





Different markets have local legislation or customs that require the contractual or promotional documentation to adjust.

# SIMPLIFYING COMPLEXITY





# DYNAMIC DOCUMENTATION ALIGNS TOO!

-  **Speed** Create and generate professional contracts and proposals in seconds
-  **Simplicity** Only relevant documents are presented our sales team
-  **Security** Controlled and consistent terms and conditions
-  **Service** Rapidly implement changes to our communications as required
-  **Innovation** Versatile communications unique to each customer
-  **Expertise** Allows expertise to be deployed across our sales organization

# WHY SMARTCORR?



**Speed**

**Create new templates easily and quickly**



**Simplicity**

**No specialist knowledge needed**



**Security**

**We can control who can edit which parts of the content**



**Service**

**Intelligent and responsive**




**Innovation**

**SaaS product – continual development**



**Expertise**

**Whatever I need – there is always an answer on how to do it**



**MERRILL CORPORATION**

**SLATE, ROCK & GRAVEL**

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**MERRILL DATASITEONE PREFERRED PRICING**  
*The global leader in virtual data room solutions*

**3 MONTH TERM**

Number of Pages	Price per page (USD)
Up to 9,999	\$0.50
10,000-19,999	\$0.45
20,000+	\$0.42

Proposed term length: Three (3) months  
Proposed preparation period: Thirty (30) days







**6 MONTH TERM**


Number of Pages	Price per page (USD)
Up to 9,999	\$0.75
10,000-19,999	\$0.70
20,000+	\$0.62

Proposed term length: Six (6) months  
Proposed preparation period: Sixty (60) days

**How can you leverage Merrill DatasiteOne to benefit your due diligence process?**


M&A happens fast. Your virtual data room provider should help you get up and running faster, unite users easily and streamline collaboration. Built by dealmakers for dealmakers, Merrill DatasiteOne combines speed, simplicity and security with a legacy of expert service and industry innovation.

-  **Security:** Trust and peace of mind. Merrill adheres to the highest global security standards, including ISO 27001, SOC 2 Type II and EU-US Privacy Shield compliant.
-  **Speed:** Quality time, not quantity time. Set up new due diligence projects in minutes. Drag-and-drop file upload. Permissions users and documents in 3 clicks or less.
-  **Service:** We are a member of your deal team with around-the-clock, on-air support – a real person answers every time for personal support focused on your needs.
-  **Simplicity:** Say goodbye to the user manuals and long trainings – highly intuitive interface, drag & drop upload, user and document permissions in three clicks.
-  **Expertise:** A global leader in the industry, managing more than 6,000 projects annually around the world.
-  **Innovation:** SaaS platform allows continuous delivery of features and functions – you're always working with the newest tools with no maintenance downtime.



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**SUPERIOR SEARCH. SOPHISTICATED AUDIT TOOLS. REAL-TIME ANALYTICS.**



**SEARCH: BETTER REVIEW. FASTER REVIEW.**

Using a premier search functionality and Optical Character Recognition (OCR), Merrill DatasiteOne helps pinpoint the exact document and passage you are looking for across massive volumes of documents. Title search and content search are combined in a single step, supporting a comprehensive search syntax.

OCR processes every document for searchability – even in scanned documents. Even image files. Located terms and phrases are highlighted in relevant content. Snippet previews display your search term in document context.

- 1 –Click generate and send proposal and SOW by docuSign. Captured data updates directly in salesforce and moves to next process step. Enforces contract consistency
- Automatically adjusts to the language of the recipient
- Content dynamically changes according to local legislation and customs
- Content dynamically adjusts for Industry
- Elapsed time for proposal creation reduced from average 2 hours to 2 minutes



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