



# Wilmorite standardizes business plans in under 10 minutes.

Wilmorite is a leading commercial real estate development and management company. With more than seven decades of experience, the company has a reputation as one of America's top builders, construction managers and real estate developers. It is a business that is continually looking for new and innovative ways to approach projects.

## The challenge

### Building a more efficient business plan generation process

Each of the commercial properties in Wilmorite's portfolio is managed via a detailed business report. These reports are updated regularly, and contain several graphs, charts and images. Creating and updating them requires a great deal of collaboration, and it often took weeks to assemble information. Once the information was assembled, each document required extensive formatting and standardization – a process that took 4 administrators a total of 24 hours to complete.

## The solution

### Automating the generation of these business plans

Early in 2015, Tribridge – Wilmorite's trusted Microsoft technology partner – saw an opportunity to automate the generation of these reports. "We had been looking for ways we could help Wilmorite accelerate some of its processes. The creation of these business plans was an obvious challenge, and one that lent itself well to automation," explains Ted Potter, Technical Manager at Tribridge. "Qorus is a close partner of ours. They offer an excellent, intuitive solutions for document generation, so they were a natural fit for this project."

Qorus allows teams to create, share and collaborate on content without leaving the familiar world of Microsoft Office.

Subject matter experts can be invited to collaborate directly into documents by allocating questions to them. They can also be sent automatic reminders as deadlines approach.

**"Qorus has helped us reduce the time it takes to standardize a business plan from over 24 hours to less than ten minutes. This, along with building a great library of reusable content, has dramatically improved our responsiveness to providing concise, meaningful information to senior management and our stakeholders."**

**Brent Marsh**

Director of Enterprise Solutions, Wilmorite

## The result

### Reducing time from over 24 hours to a matter of minutes

Thanks to a set of pre-designed Word templates that content automatically plugs into, Wilmorite could dramatically reduce the number of hours required to generate, format and standardize these business plans.

“We created ‘interview forms’ for property managers to complete. This information is then automatically pulled into the templates to ensure consistency,” explains Potter. “This saves a huge amount of time and has improved the quality and consistency of these business plans.”

“The other great thing about Qorus is that it gives Wilmorite’s VP of Operations a dashboard view of what has been submitted and prevents long, confusing email chains. What used to be an 8-week process now takes around 75% less time just because it’s easier for the various stakeholders to collaborate.”

## What came next?

Tribridge further helped Wilmorite identify opportunities to leverage the Qorus solution in other areas of reusable content, including for the creation of monthly management reports.

## See Qorus in action!

Boost productivity, enhance the customer experience, and accelerate the sales process with Qorus.

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## About Qorus Software

Qorus is the sales enablement platform that connects people, content and data to get to market fast and win more deals.

Our software is incredibly powerful but highly intuitive and very easy to use. It’s integrated across Microsoft 365 and major CRMs. Our award-winning Customer Success Team ensures our clients across all industries reach their goals.

We are a diverse, vibrant group with headquarters in Seattle and major offices in New York, London and Cape Town.

