

## SUCCESS STORY

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- Drew Auman,  
Application  
Team Leader,  
CTPartners.

## activePDF Solutions Enable CTPartners to Streamline Document Distribution Processes and Reduce Lost Sales

Company: CTPartners

Industry: Executive Search Firm

Product(s) Used: activePDF Server/DocConverter, activePDF Toolkit

### Solution Spotlight

In addition to streamlining its PDF conversion processes, CTPartners uses activePDF solutions to support its dynamic, time-sensitive sales cycle by empowering field representatives to instantly produce customized sales literature on the fly.

### Company Overview

Established in 1980, CTPartners ([www.ctnet.com](http://www.ctnet.com)) ranks among the top 10 executive search firms, both in the U.S. and global rankings. Focusing on CEO, Board of Director, and senior-level executive search and selection, the company’s clients range from high-profile startups to companies in the Fortune 50 and Euro Top 500.

With a long and proud history of utilizing technology, CTPartners offers two proprietary tools that ensure a successful search experience. ClientNet® is a password protected extranet that provides 24/7 access to a search status and Candidate Central® offers candidates comprehensive information on a prospective client company, shortening the search cycle. These industry-best technologies provide a constant communication flow and ensure that a search is flawlessly executed.

40-Day Audit™ provides a formal feedback mechanism and ensures that search milestones are met according to client expectations. A post search Client Quality Satisfaction Survey™ creates an opportunity for continuous improvement. Both are checks and balances that ensure a search happens on time as requested. This commitment to quality execution ensures that a client’s business objectives are met in as timely and efficient a manner as possible.

## Business Challenge #1

In 2000, CTPartners implemented an application which required files to be converted from Microsoft Word® to PDF prior to uploading to the system. Though CTPartners had been using PDF as a means to distribute information among its clients and candidates, the company had only purchased 2 or 3 licenses of Adobe Distiller® software to support a user base of over 300 employees. With the new application, when documents needed to be converted users would scramble to gain access to one of the machines where Distiller was installed. Not only was this disruptive to individual productivity, it created a bottleneck for uploading information to the system. Although the obvious choice was to purchase a license for each employee, the CTPartners Application Team recognized the challenges it faced in rolling out a desktop solution. In addition to the initial cost of individual software licenses, the training and ongoing maintenance costs would be considerable. Further, the learning curve associated with proper PDF creation was significant, and the team was concerned that users would be overwhelmed by the software's numerous options. Faced with these challenges, they began looking for a server-based solution.

## activePDF Solution

After investigating available server-side PDF converters, the application team selected activePDF DocConverter®. Licensed per server rather than CPU, DocConverter provided an affordable alternative to costly desktop PDF generation software, enabling them to quickly extend PDF generation to the entire user base. With its robust API and hotfolder technology, DocConverter afforded flexibility in deployment, without sacrificing performance. Perhaps more importantly, DocConverter virtually eliminated the need for end-user intervention. "Unfortunately with a product like Distiller, people need to be trained and retrained on how to work with PDFs, said Drew Auman, Application Team Leader for CTPartners. "This type of software is sometimes confusing to people who use it intermittently. By extracting the complexity and providing them a simple process from Step 1 to Step End, we've minimized the amount of end user training required in order to be productive." With DocConverter, CTPartners could now produce centralized conversion "profiles" to control the settings for every PDF uploaded to the system, ensuring a consistent look-and-feel while eliminating the need for end user training. In addition to addressing the initial need of converting Word files for one specific application, employees were now able use DocConverter to convert all types of documents, including resumes, position profiles, and more. "We went with DocConverter because it was cost effective, centrally managed on a server and provided a robust set of APIs to integrate with", Auman notes. "It's hard to quantify the ROI as we just don't track to that level of detail. However, it's obvious there has been significant cost savings over going with a Distiller product that was proposed to be installed to well over 300 employees, not to mention the improved efficiencies."

Although DocConverter provided an ideal solution to address the technical side of the company's PDF generation process, CTPartners still faced a challenge in overcoming the cultural hurdles. Employees were used to the old process, and it took some time to adjust. "They would print out a resume to the printer, take the paper copy to a scanner, scan the resume back into the computer (losing the native formatting because now the document is a picture), and then they would then somehow convert that image file to a PDF and upload it into the system. Crazy process, right?" said Auman. "Unfortunately, once a person finds something that works for them, regardless of the damage it might be doing to the organization, they continue until told otherwise. The files they were generating were at least 10-50 times the size that a properly produced PDF would have been converted to." Company-wide training helped overcome the cultural barriers by educating employees in the new process, and in a short time, CTPartners realized the full benefits of its DocConverter solution.

# activePDF

## Business Challenge #2

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Shortly after the implementation of DocConverter, the application team ran into another document distribution challenge, this time affecting the sales process. For each prospective client, a custom “sell pack” would be created, outlining the company’s offering, providing account team bios, and providing other client-specific information. The process for producing a sell pack was manual, and required extensive involvement from the marketing team. Once a call came in from the field rep, an administrative assistant would notify the marketing team that a new pack was required and outline what information to include. The marketing team would then produce the pack at which point it could be sent out to the client. The whole process could take several days and was subject to miscommunication. In the highly competitive marketplace, the sales team could not afford the amount of time required to produce the packs, and could not afford to lose face with the client if a sell pack was produced incorrectly. “The old process did not empower the team members in the field with the ability to assemble these sell packs themselves,” said Auman. “A lead could come in at 9PM on a Friday night over a business dinner and the administrative assistant might have to wait until well into the following week to finally get the request processed through marketing.” The bottleneck created by this manual procedure was impeding the selling process, and CTPartners was concerned they were losing sales as a result.

## activePDF Solution

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After the success of activePDF DocConverter, the application team was quick to turn to activePDF for a solution to this new problem. Using activePDF Toolkit®, they developed an ASP.NET application that enabled field reps to easily assemble custom sell packs on the fly. In addition to splitting, merging, and appending PDF files, Toolkit’s robust API provided the team the ability to dynamically place images and text into PDF documents, giving them a great deal of flexibility and control over their PDF output. The marketing team created PDF templates which could be used in the PDF production process, enabling the sales force to easily produce custom content while maintaining brand identity and corporate “look and feel”. Within minutes of speaking with a CTPartners representative, prospective clients could now receive information tailored specifically to their unique needs. As a company that advertises agility in a marketplace that demands it, CTPartners struck gold with its implementation of activePDF Toolkit, providing its field reps the ability to instantly produce customized, high-quality sales literature specifically addressing each prospective client’s needs. According to Auman, “activePDF enabled us to offload our manual process to a system on the internet in which anyone in CTPartners could leverage at any time, day or night, without the intervention from marketing personnel. In the end, this saved us time, money, and potential loss of business.”

## Results

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Although the exact figures have not been tallied, to Auman, the return on investment from the deployment of activePDF DocConverter and activePDF Toolkit is immeasurable. “With these two solutions, we saved on costs of having to deploy Adobe Distiller to each and every team member of the organization. We saved on training costs because the team members are only given the functionality that they need without confusing them with a Distiller set of tools. We sped up the time to delivery from several days or weeks to an hour or less. We can deliver sales pitches much quicker, which essentially leads to improved customer satisfaction and more business.”