Sales Management Solutions

Automating processes & document generation

by: Brent Hoskins, Office Technology Magazine

Most office technology dealerships have some system in place that streamlines or even automates aspects of the sales process. At one end of the spectrum are dealerships embracing the daily use of a fully configured CRM with an expansive collection of time- and cost-saving capabilities — document generation, TCO analysis, workflow automation, etc. On the other end of the spectrum are dealerships with no CRM in place, attempting to manage sales with such tools as Outlook and Excel.

Where is your dealership on the spectrum? If it is at or near the low end, it may be time to take a look at the sales management solutions available to office technology dealers. Consider the broadening range of products and services offered by dealerships. Many would likely contend that this reality alone presents a compelling reason for dealerships to automate many of their sales processes in order to increase the time their reps are in the field.

Below is a brief look at the sales management solutions of three companies. Perhaps the comments shared will serve as a springboard for you to take a closer look at your current sales management tools and processes.

Compass Sales Solutions

As a dealership sales manager, Troy Casper saw an opportunity to develop a software solution to help sales teams automate their business processes more efficiently. Excited about making an impact on the industry, he learned to code software and developed the first iteration of a tool specifically for sales managers and their teams. He then showed it to his business colleagues and others in the industry to confirm that he was on the right track. "They were impressed and encouraged him to further build it out and sell it to the channel," says Tami Dittemore, vice president of operations for Compass Sales Solutions. "Troy left that dealership and started Compass Sales Solutions. That was about 20 years ago."

Today, Compass, now owned by Eden Capital, remains focused on the sales side of the business with Sherpa, a contact and sales productivity solution for office technology dealerships. "Sherpa serves as an intelligence 'hub,' combining all existing tools that dealers have in their business operations, such as DCA, marketing and commission tools," says Jim McMeel, vice president of business development. "Sherpa allows dealers to tie disparate tools together into one ecosystem, creating substantial value for sales reps and sales leadership."

Dealers not familiar with Sherpa may assume it is simply a CRM, McMeel says. "But then we ask such questions as: 'What are your manufacturer relationships? Where do you have leasing partner relationships? Which aftermarket suppliers do you work with?'" he says. "We ask such questions because many of the features within our platform provide dealers the ability to tie these relationships together, automating what the sales rep is doing.

"Dealers save a substantial amount of time because of the depth and breadth of functionality that exists," McMeel continues. "They've replaced manual workarounds with one streamlined solution that gives them the visibility they need to make better business decisions quickly."

As noted, Compass offers CRM functionality. It does so as part of the Sherpa Trek version, which also includes e-automate integration and performs such tasks as TCO analysis, proposal and post-sale paperwork generation, and lease tracking. It also features SherpaGo, giving sales reps mobile accessibility in and out of the office. Sherpa Expedition is the full suite, but excludes the CRM functionality, McMeel says, noting that this version is for those dealerships that have already made a substantial investment in a CRM platform.

Noting that Compass has a solution that can fit the needs of any dealership, no matter its size, McMeel emphasized that the company can easily demonstrate the ROI. "We can show dealers that a key benefit is in client retention; 'What if I am missing lease expirations? What if I am misconfiguring deals, leaving gross profit on the table?'" he says. "These are the types of things we can educate them about with our ROI calculator — 'the return to your business is substantial and tangible.' It's a very powerful tool."

> "You could have salespeople ringing the bell all day long, but if you can't get the deal documented, the equipment ordered and fulfilled, and communicate with the leasing company … so that you … get funded, it doesn't mean anything."
>
> *— Tim Szczygiel*
> *SalesChain*

SalesChain

When SalesChain was founded 18 years ago, the focus was on providing dealerships a tool to make the sales process more efficient. "In essence, what we do is we provide workflow automation and business intelligence to all aspects of the business selling process, order fulfillment and documentation processes — everything that goes into winning a deal and documenting it," says Tim Szczygiel, founder of SalesChain. "You could have salespeople ringing the bell all day long, but if you can't get the deal documented, the equipment ordered and fulfilled, and communicate with the leasing company properly and efficiently so that you ultimately get funded, it doesn't mean anything."

Citing such capabilities as automated deal pricing, proposal generation, product ordering and commission calculations, SalesChain offers a cloud-based CRM system "that has as much automation as possible, and integration with the next step — and the three steps ahead — so that all the employees in the dealership can effectively work together in a very efficient way," Szczygiel says. "That's business workflow automation."

SalesChain's bidirectional integration with e-automate is a key component of the automation offered by the company, Szczygiel says. "When you talk to owners, finance managers, service managers and operations managers, you learn that there are a whole lot of people getting paid to type data manually into different systems," he says. "In contrast, we have a very comprehensive bidirectional integration with e-automate, where events that occur in e-automate update SalesChain, and events that occur in SalesChain update e-automate."

Beyond eliminating the need to type data into multiple systems, Szczygiel shares another example of the type of efficiency-focused information offered by SalesChain. When he asks a dealer prospect how long it takes to fulfill an order, "the answer is often 'about two to two-and-a-half weeks,'" he says. "I then ask, 'Do you really know?' The answer is 'no.' With SalesChain, we have a dashboard that literally shows the time the salesperson submits a deal to the operations department to the time it gets funded by the leasing company. We measure every step of the process and how long it takes for each step. The owner is able to click a button at any time and see what those stats are, drilling down to the branch location, the team or the rep to see who is inefficient and what's causing those inefficiencies."

The Sailor Group

Rohan Santora, director of sales for The Sailor Group, recalls the day approximately 11 years ago when he and the company's founder, Ed Barfield, were at an off-site training session. At the time, they both worked for the same Florida dealership. "We were sitting in training, he opened up his laptop and said, 'Take a look at this CRM I found; this thing is so customizable, I'm doing all kinds of things with it,'" he recalls. "He said, 'I think I can turn this into the CRM I never had as a sales rep.'"

Soon, Barfield was working with a local developer and eventually announced: "'I'm going to leave my job and develop this into a platform for copier dealers; they need this,'" Santora says. "So, he left the dealership and, in 2009, founded The Sailor Group. In 2010, he launched AgentDealer."

Today, The Sailor Group is an authorized reseller of Salesforce. "Our product is a custom version of Salesforce that we've developed for this industry," Santora says. "We built AgentDealer on the world's best CRM platform so that sales reps can be more productive and have more information, and dealership principals can make better decisions based on what their reps are doing."

Santora emphasizes that AgentDealer fully integrates with e-automate, whether on-site or in the cloud. "We can sync and house meter-read data, service call detail, lease information and service contract data, making it all visible to the sales team," he says. "We can speed sales reps up and increase their productivity so they don't have to search for information or have somebody run reports for them."

AgentDealer also generates documents relevant to the sales process, Santora says. "We can generate just about any type of document, whether it's from a business record or equipment record, a contact record or a deal," he says. "This includes things like proposals, leases and sales orders. We also have a TCO tool for converting printer audit data into the comparisons that sales reps need to put MPS programs together. In addition, AgentDealer is fully mobile, so sales reps want to use it. They can be more profitable while out of the office, which leads to higher productivity for the rep and a better ROI for the dealership.”

“In addition, AgentDealer is fully mobile, so sales reps want to use it. They can be more profitable while out of the office, which leads to higher productivity for the rep and a better ROI for the dealership.”

— *Rohan Santora*
The Sailor Group

Santora notes that The Sailor Group offers three editions of AgentDealer. “‘Basic’ is for the dealer who may not necessarily have an ERP, like e-automate,” he says. “They may not need a quoting tool with all of the bells and whistles, but they do want an industry-specific CRM with some simple quoting functionality and the ability to generate documentation.

“The ‘Executive’ edition, used by most of our dealers, integrates with e-automate,” Santora says, noting that Executive also provides for professional quote building. “As an option, that integration can pull information into AgentDealer and push quotes back into e-automate in order to streamline the order process.

“And, finally, ‘Premier’ is for those dealers who already live in their CRM but now want to take quote building and go to the next level, building rules around their configuration sheets,” Santora continues. “So, for example, if you add a fax board, the system provides the reminder: ‘Don’t forget to add memory.’” ■

Brent Hoskins, executive director of the Business Technology Association, is editor of Office Technology magazine. He can be reached at brent@bta.org or (816) 303-4040.