

Sales Force Automation

Helping dealerships increase the bottom line

by: Brent Hoskins, Office Technology Magazine

There is no doubt that the practice of the dealership sales rep relying on manual tools — the Rolodex, note cards or hand-written notes — to manage information on current and prospective accounts has long since passed. So, too, have the resulting inefficiencies. Today, most reps use one of several sophisticated software-based tools that help them more effectively manage information and win new accounts. Of course, your reps are among them — right?

Or, are your reps (although they long ago gave up their manual tools and processes) using less sophisticated software, such as Goldmine or ACT? If so, then perhaps the time is right to take a look at the three leading sales force automation software companies specifically focused on the office technology industry — Compass Sales Solutions (www.compasscontact.net), Falcon Technology Solutions (www.efalcontech.net) and SalesChain (www.saleschain.com).

While the three companies' products offer a range of capabilities, it does not take long to see the benefits of their use. Troy Casper, president and founder of Compass, cites the savings in time as key among the product's benefits. "We can save them 70 percent of the sales process time," he says, regarding the use of his company's product, Sherpa, as compared to the time consumed by manual processes. "Put that in dollars. If your reps can do their jobs 70 percent faster, that's huge."

There is also the benefit of ensuring that sales reps are fully informed, which is particularly important when calling on a current customer. "The sales rep will have quick access to the contract information, leasing information and all the critical things that will make him (or her) sound intelligent when he talks to the customer," says Scott Lindsoe, president of Falcon, makers of Soaring. "I think customers are fairly insulted when the rep doesn't know the information.



That could be a problem, especially in this industry with a fairly high amount of turnover. If a rep asks the customer a number of questions and six months later, a new rep comes in and asks the same questions, that can get frustrating for the customer."

Of course, the use of sales automation software offers benefits greater than simply easy access to account information. Tim Szczygiel, president of SalesChain, shares a partial description of his company's mySalesChain product, which provides a sense of the broad scope of the product's capabilities. His description reveals the "chain"

attributes reflected in the product name. "We have a structured telemarketing module that fully integrates with a comprehensive sales management module, which is fully integrated with advanced user activity and forecasting tools," he explains. "They are integrated with our deal pricing, order documentation, delivery and workflow automation system, which is fully integrated with our commission management system."

The "chain" also extends into the dealership's back-office service automation solutions, whether it is integration with Digital Gateway's e-automate or ECi's OMD or La Crosse. Access to the data from the service side can arm the rep with information that can lead to increased sales, says Robert Treitel, national sales manager for SalesChain. He cites examples of the types of data mining possible using the company's product. "The sales rep could seek specific information through advanced queries," he explains. "'Show me all of my customers who required three or more service calls last month' or 'Show me all of my color copy devices doing 10,000 copies a month or more' or 'Show me accounts where leases expire in the next six months that haven't been touched in the last 60 days.'"

Szczygiel further explains the value of data mining with

the use of mySalesChain. “The rep could query, ‘How many of my customers and on which machines have they produced more volume than they should?’ meaning those machines that are overused,” he explains. “Short-term, a dealer might make money on the overages, but ultimately, excess overages are detrimental to dealerships because that makes them prone to competitors leveraging the information and using it against them.”

The task of building a report of customers with overused equipment may have previously been within the domain of only the dealership owner, “but with mySalesChain, we can bring that down to the average sales rep’s ability,” says Szczygiel. “The rep can proactively build such reports or use our comprehensive workflow engine to implement an alert mechanism so that he is alerted when machines are overused.”

SalesChain’s product is available at two levels. mySalesChain Gold provides complete host system information for all account equipment, meter counts, monthly averages, multi-meter usage, linked assets, service history, invoice history, contract information, lease buyouts and competitive equipment details. The software also includes integrated document imaging and retrieval to provide online access to supporting documents. The product can be accessed at the desktop and also in the field via mobile devices. mySalesChain Platinum enhances the value of the flagship mySalesChain Gold product by adding the capability to price and document sales proposals and orders. A third product, mySalesChain Delivery Desk Automation, provides workflow software to enable various personnel and departments involved in the delivery process to efficiently communicate and collaborate.

Falcon’s Soaring offers a full range of capabilities as well. It, too, integrates with e-automate, OMD and La Crosse and can be accessed from the field, via mobile devices. The list of features, beyond serving as a CRM (customer relationship management) system, is lengthy and includes, in part, tools for benchmarking, territory management, lead management, forecasting management, TCO (total cost of ownership) calculations, e-mail campaigns, account change/adding review, document and template integration, multi-division capabilities and leasing data integration.

One of the most recent enhancements to Soaring, says Lindsoe, is integration with the Microsoft Office Suite. “More and more, reps are using e-mail,” he says. “So, a lot

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of times, the reps want to know how Soaring is going to work with Outlook, along with Word and Excel. So, we have tied Soaring to these Microsoft programs. If the rep gets an e-mail from someone that he wants to store in the Soaring database, with a click of a link, he can easily do so. In addition, while working to generate reports and documents, the rep can now

write directly to Word and Excel from Soaring.”

The next enhancement for Soaring, says Lindsoe, will be a managed print services (MPS) tool, now being tested by several Falcon dealer customers, with a target launch date in May. “There is information associated with MPS coming from print auditing devices, the dealership’s back office, etc.,” he says. “Basically, Soaring users will have a tool that will gather the information, organize it and analyze it so that they can make a recommendation without having to sit down and spend a lot of time on manual work.”

At Compass, the inclusion of MPS tools has been a part of the company’s product offering since it was established, says Casper. With the use of Sherpa, the process begins with a TCO analysis for both printers and MFPs in the customer location, he says, to determine what the customer is spending on document output. “With the TCO analysis complete, next, the rep can determine what he wants to propose to the customer with a unique tool we call Asset Strategy,” says Casper. “With this tool, the rep is able to map devices in order to determine whether it is best to recommend device consolidation or replacement.”

Another tool, says Casper, allows for service pricing of existing equipment (that the rep recommends to remain in use) to be automatically calculated. “With the push of a button, the rep gets his pricing,” he explains. “Sherpa scans the list of printers to determine which are authorized for service by the dealership. For the authorized devices, a service rate is provided. So, if there are, for example, five printers, they are blended together to give a cost per page of .017 cents.”

From there, says Casper, Sherpa will calculate the cost of any new devices and accessories included in the bundled proposal. “The rep can then use the software to blend all of the costs together [existing and new equipment] and determine one cost per page for the customer to cover everything,” he says. “So, for example, the rep could say to the customer: ‘For .019 cents each at 30,000 pages monthly, we can replace these two pieces of equipment with new

hardware and we will cover the other 10 printers that you have on site.”

While TCO and MPS tools are key components of Sherpa, says Casper, the product includes a full range of account management capabilities. Beyond the industry-specific CRM, other capabilities include: electronic data imports and integration with e-automate, OMD and La Crosse; fleet management applications; on-site analysis agents; a financial calculator; proposal and paperwork automation; and order processing management. In addition, Compass will be unveiling Sherpa Go this spring, which allows for access to the software from mobile devices.

Is it time for you to take another look at a more sophisticated sales automation software product? If so, advises

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Casper, avoid allowing any real or perceived “fear of change” to be an obstacle. “When we demonstrate our product for dealers, they are always worried about their ‘old-timers’ on the sales staff, since it is newer technology; they say ‘They’re not going to be able to embrace this,’” he explains. “In reality, they are the ones who respond the best. They say, ‘I’ve been waiting for some-

thing like this for years.’ They plug in their information, and they see good things start to happen.” ■

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