

Partnership Valuation = Dealer Success

Copy R and Compass Sales Solutions

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Prior to partnering with Compass in 2008, Copy R had started with a well-known CRM that was hosted remotely, while also teaming up with a different company to help with TCO reporting and proposal writing. However, it soon became apparent to Copy R that they had initially started off on the wrong foot. Following a year of frustration with both the CRM, which had little to no personalized service let alone on-site service, and the TCO reporting which was extremely difficult to use, Copy R threw in the towel and began looking for other options, finally settling into an agreement with Compass Sales Solutions. Deciding on Compass essentially “killed two birds with one stone” as they ultimately found a solid CRM wrapped up neatly with arguably one of the best TCO reporting / proposal writing software solutions in the business.

Copy R Office Solutions LLC, is an authorized dealership for Ricoh and Kyocera which was established in Burbank, California in 1965, and later acquired in May 2007. Today the company is operated by Brett Edmondson, President, and Robert Ravitz, COO. Brett is a 23 year veteran in the business, with 16 years experience at the manufacturer level with Kyocera Mita, as Sales Trainer, Area Sales Manager and Regional Sales Manager for the Copystar Group. He possesses CDIA+ certification as well as MPS credentials from Print Management Solutions Group and Compass Sales Solutions. He is proud to note that Copy R was the first Kyocera dealership in the West to receive their Certified MPS Dealer accreditation. Rob, in turn, was the driving force for sales with Advanced Business Systems (now a Global Xerox dealership) in Chatsworth, California, for over 20 years.

When asked why Copy R chose Compass, it is easily explained through a conversation between George Gallian, Compass’ CEO, and Copy R Office Solutions’ President, Brett Edmondson. George puts it simply as, “The main reason Copy R chose Compass over the competition is because it was created by copier salespeople, specifically for copier salespeople.” Of course, Copy R discovered that Compass is far more than just your average CRM, or simply a tool used to sell copiers.

Compass Sales Solutions was founded in March of 2002, by Troy Casper. As a fifteen-year veteran of the industry, Troy started on the street as a sales representative and was later promoted to sales management. In the summer of 2000, Troy began formulating the idea of creating an all-inclusive software package. His goal was to design a simplified process for a sales representative to not only manage his accounts but to also write cost-per-print contracts from start to finish. His first product, Compass Contact, was the launching point for Opportunity Manager, a complete sales productivity solution for office equipment dealers. Today, Compass Sales Solutions is a complete contact and sales productivity solution for businesses competing in the cost-per-print market.

“There are a lot of solutions out there when it comes to Managed Print Services, but most are only partial solutions or plug ins,” says Shawn Cashmark of Compass. “Compass is truly an A to Z solution which takes the copier company from first contact all the way through implementation, whether it’s just a simple single copier deal or a complex MPS solution and beyond.”

Many of Compass's current customers use Sherpa software for their contact management, but their entire sales force management is geared around the tools inside of Sherpa. This includes: accountability reports, account strategy, forecasting and a fully customizable sales funnel dashboard. By centralizing all data for a prospect in one location, including e-mail correspondence, the sales managers can track and monitor every aspect of the account and easily transfer the prospect to another sales rep, saving crucial time without letting any prospects fall through the cracks.

"I find having the E-mail Repository and Contact Activities features of Compass is like having a personal organizer at my fingertips," notes Brett. "No longer do I have to search frantically through a host of potential folders where a proposal might have been saved, I need look no further than the document links for the customer I am working with." It is truly the people at a company, however, who really make the difference. From the professionalism of live support when calling the help desk, to the more complex support when putting together an MPS deal, without question it is the knowledgeable know-how and assistance that makes a real impact.

INSIDE IMPROVEMENTS

Since implementing Compass nearly three years ago, Copy R has made dramatic improvements to its systems and processes. Along with an in-house data collection server, Compass is also likewise tied into their ERP system, e-Automate. All Copy R sales work is now embedded within Compass using custom made templates. This includes first class proposals from one page, simple, single unit proposals to more robust five page detailed proposals and their flagship Executive Summary. All sales orders, maintenance agreements, rental agreements, etc., are likewise a part of Copy R's template database. All Copy R sales personnel are required to use these documents for all sales related activities.

"In truth, unlike in the past when the sales rep had no incentive to use the CRM tool, now creating sales orders and first class looking proposals has never been easier," says Brett. "In fact, in the last year we have gone through more high quality paper, cover stock and binding rings than this company has used in the last 10 years prior! I would also add that I have personally had numerous compliments from other dealers with regard to the quality, content and look of our sales documents."

"Although we were reluctant at first to spend the money, Copy R's decision to jump to the Sherpa platform with Compass is one we have never regretted. Even our most 'old school' rep has really gravitated to Sherpa and in fact has become our most disciplined rep in terms of consistent use of Compass sales forecasting."

CUSTOMER SOLUTIONS

Using Compass Sherpa through the entire sales cycle, Copy R took one of its oldest customers, a high end law firm, and did a top shelf upgrade. What started out as a simple (2) unit MFP upgrade, turned into a sale which included an upgrade to two Ricoh monochrome console MFP's (80 PPM and 90 PPM). Moreover, all desktop printers were put under a managed program, Rules and Recovery based printing via Ricoh PCS Director (Print Audit 6) implemented, and an e-Copy solution added for scanning. In addition, in the case of the Managed Print Agreement that was proposed to the client, some interesting discoveries were made followed by some creative solutions. Specifically, the customer was presently using compatible toner for his HP printers, etc. Furthermore, several of his printers were already under contract with two other vendors. Now the objective was to put

everything under the wing of one vendor and where possible, save money in the process.

Following the process of gathering meter readings, current supply and maintenance costs and entering everything into Sherpa, Brett created two unique proposals. Here is how it was basically presented to the client:

Proposal # 1

“I have good news and what I believe you will find to be excellent news. First, the good news”... (proposal #1 illustrates how Copy R could take all of his client’s HP’s and few Kyocera printers and put them all under one contract, using compatible toner) ...”this solution can save your firm \$60 per month in operating expenses.” Obviously, no loud applause here as the savings is small.

Proposal #2:

“Now the excellent news”... (proposal #2 replaces seven HP models with brand new Kyocera printers).... “by removing your HP 1505’s from the fleet and replacing them with brand new state-of-the-art Kyocera printers, units that will not only give you improved speed but are also standard duplex and network ready, Copy R can save your firm a minimum of \$120 in monthly operating expenses!”

Of course the proposal examples are simplified here, but the bottom line is that within days, Copy R had sewn up this specific deal and didn’t have to lower prices even though they were higher than their competitors on two MFP’s. Copy R had more than realized a return on their investment. Without question, the integrated relationship between Compass, Copy R and its client is a profitable and respectful one, eclipsing the initial solution in favor of a bigger and better one.