Analytics & Automation

Three dealerships tout the value of their CRMs

by: Brent Hoskins, Office Technology Magazine

By now, you are likely using CRM (client relationship management) software in your dealership. Or are you? Perhaps you are utilizing a homegrown collection of tools that get the job done. Or do they?

Following are profiles of three BTA member dealerships, providing a brief look at their CRMs. Perhaps the comments and insight they share will provide you some guidance as you seek to add a CRM to provide for analytics of sales data and time-saving automation of your processes.

When Budget "went all in" with SalesChain, "the time savings were huge for both our sales and admin staff," Kelliher says. "We now had published lease rates and product pricing right in the CRM, eliminating the need for manual calculations and removing the possibility of human error." Going "all in" has "opened new trackable channels of communication and added redundancies as we hand off from sales to admin to service. Overall, that has been a huge win."

Budget Document Technology

Budget Document Technology, a Konica Minolta, Lexmark and Xerox dealership, is based in Lewiston, Maine, with additional offices in Hamden, Maine, Manchester, New Hampshire, and Amesbury, Massachusetts. Tom Ouellette is president of Budget. His brother, Steve Ouellette, serves as CFO.

It was in 2013 that Budget began using SalesChain as its CRM, says Kevin Kelliher, vice president of sales, noting that for a period of time, it remained a hybrid environment, with both the CRM and legacy paper-based processes in place. "Tom and Steve started using SalesChain for its integration with e-automate, for managing accounts, rep notes and client contacts," he says. "But our sales process remained manual and paper-based, outside of the CRM."

When he joined the dealership nine years ago, the hybrid environment was still in place, Kelliher says. However, in 2019, Budget "implemented SalesChain's Proposal module, which allows sales reps to create quotes and submit orders right in the CRM," he says. The dealership also added SalesChain's Delivery Desk workflow automation system, a set of tools designed to help a dealership organize, automate and measure the efficiency of its fulfillment processes. "That meant that our sales team's order forms, equipment setup sheets and paperwork would go straight to our schedulers and, ultimately, to our service team for implementation — all from within the CRM."

The use of SalesChain by Budget's sales reps is "100% mandatory," Kelliher says, noting that when he took on the vice president of sales position he "knew the software's capabilities and our current processes well, and helped to enable some of the latest features offered by SalesChain. They include a more advanced Service Module and integrations with CEO Juice that allow reps to request copies of recent contract invoices and generate comprehensive quarterly business review (QBR) documents to review with clients."

Kelliher shares a glimpse into the daily routine of Budget's sales reps and their use of SalesChain. "Reps start the day by checking their SalesChain calendars, which have all their meetings, account reviews and blocked time for planned sales activities," he says. "They use the MIF [machines in field] feature to identify devices that are approaching end of life and the Lease Desk feature to track upcoming lease expirations. This allows them to start informed conversations with clients and create custom solutions with long-term focus. We live and breathe by that calendar."

Each time a rep engages with clients, he (or she) is going to make a note in SalesChain of what is found, Kelliher says. "So, if 'John Smith' is no longer the purchaser at the client location or is retiring and a new person is being onboarded, put that in the CRM," he says. "We want to know that."

Kelliher has nothing but praise for SalesChain in terms of its level of support and training. "They're awesome; in a word, 'excellent,'" he says. "Email requests to support at SalesChain are going to result in a response within an hour or two with a resolution. Plus, they'll schedule sales training as needed. In fact, they added a hundred or so topical training videos under the support tab. So, the reps can use those as reference tools for activities they may not be doing every day."

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GoodSuite

Based in Woodland Hills, California, and celebrating its 25th anniversary this year, GoodSuite serves 10 counties in the southern half of the state, from Fresno to the border with Mexico. The company started out as a Xerox agent. Today, it offers Sharp and Konica Minolta products — and managed IT services.

GoodSuite implemented The Sailor Group's AgentDealer (AD) CRM in 2019. John Christino, the dealership's sales operations manager, serves as admin for the CRM. In that role, he has found that "one of the strongest features of AD is its reporting functionality," he says. "The CRM is based on the Salesforce platform, which is known for its customization. We can create some pretty fantastic customer reports. The management team members rely heavily on our ability to pull up detailed sales metrics and rep activity reports."

Christino shares the example of one of the many customized reports he has built in AD. "I have a report that shows us all of our top 20% clients by revenue that have a lease expiring in the next six months," he says. "In addition, it shows us the 'health grade' for each of these clients based on such factors as the client's tenure with us, whether or not they have been cross-sold — they are stickier that way — and whether they've had any major complaints with us recently."

With AD's customizable reporting capability, "I can usually get Dan [Strull; founder and CEO of GoodSuite] whatever information he needs to make critical decisions," Christino continues. "AD also helps us automate a lot of day-to-day tasks; I have the ability to automate almost anything I can think of, building all kinds of customer alerts. For example, when a customer emails us and is upset about something, I have a bit of AI built in where I can get an alert and I am able to notify the appropriate people. We can respond quickly."

Lease management is a particularly important capability of AD, Christino says, noting that with "a click of a button" fully completed lease documents are generated for sales reps. Strull says monitoring those lease documents is a part of his routine. "At the senior leadership team level, we measure the number and dollar amount of the lease documents that are generated," he says. "We don't measure the number of cold calls; we measure the number of lease documents. That gives us an idea of the sales reps' pipelines — an idea of our order and hit rates."

AD also allows management to monitor contact with clients in the months leading up to a lease expiration date. "At a glance, I can tell you the exact date that the primary contact at the client location had a conversation with somebody from our company," Christino says. "That way, for example, we can see whether the client has a lease maturing in three months but has not responded to a single email from GoodSuite this year. We need to know that."

One area of The Sailor Group's current initiatives with AD will help to support a key growth area at GoodSuite. "Our IT business is 22% of our revenues," Strull says. "Over the next three years, I project that we will become 50% imaging and 50% IT." While the dealership's IT department uses ConnectWise to manage its service tickets, "we do use AD to log and track activities and opportunities for those IT deals," Christino says. "AD is actively working on a ConnectWise integration and we're actually part of their pilot program. It's very promising. We'll have the ability to sync ConnectWise and AD in real time, and we're supposed to have the ability to see all of the service tickets from the IT side in AD."

Christino recommends that every dealership that uses AD ensure there is an admin assigned to manage the CRM. "I think the best thing that a dealer can do is to get at least one person trained as an admin, so that he or she can do all of the customizations and projects in-house," he says. "That person can troubleshoot any issues that come up in real time, rather than having to wait for support. That is the best thing that a dealership can do. That's made a huge difference for us."

The Lioce Group

Reported to be the largest independent office technology dealership in the state of Alabama, The Lioce Group (TLG) is headquartered in Huntsville, with a second office in Birmingham. Under the leadership of its president, Nick Lioce, the dealership offers Canon, Konica Minolta and Sharp products, as well as mailing solutions and electric vehicle (EV) chargers.

In about 2010, the dealership implemented what is today Sherpa CRM by White Cup. "Prior to that we had kind of a piecemealed collection of Excel documents, PowerPoints, etc. — a lot of homegrown information shared throughout the office," says Bill Berg, vice president of sales. "For example, we would have a proposal template that someone put together and would run with that for a while. It was tough."

Life changed at TLG when Sherpa CRM was implemented. "It not only generates proposals for us, but it ensures we have accurate orders, product numbers and pricing," Berg says. "It has given our management team a way to track account information and sales rep activity. It has simplified taking a customer from the first stage — establishing a relationship — to building proposals to placing the final order. It takes us through the full sales cycle, putting everything in one place. It has saved us hours and hours. Truthfully, I don't know how we would have grown to the size we have without it. We put anything that goes out of this building — whether it be a loaner, rental or sale — through Sherpa."

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Berg says the investment in the CRM has paid off in just the elimination of simple errors. "Before, when we were placing equipment orders from Excel spreadsheets, just one Excel error would throw everything off," he says. "So, it's paid for itself in that way. As long as you consistently have good data, Sherpa has taken that whole error element out of it."

Addressing the common challenge of getting all sales reps to utilize the CRM daily, Berg acknowledges that it is sometimes difficult to get some reps to use Sherpa CRM as they should. "You've got to manage it correctly," he says. "I regularly talk about it with the reps in sales meetings; how inputting information will benefit them. I recommend that the reps primarily use the CRM early in the morning and again at the end of the day, but that

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The Lioce Group

it should be like clockwork. ‘It reminds me of what I need to do today and I am setting up reminders for what I need to do down the road.’”

What information is Berg most often viewing in Sherpa CRM? “It’s the pipeline,” he says, noting that TLG has customized each stage of the sales process. “We treat it like baseball — first base, second base, third base and then it’s ‘the close.’ I’m looking at that a few times a week to see if our games are in line; do we have what we projected, not only for this month, but for 90 days out? That’s where I spend most of my time in Sherpa.”

Berg advises other dealers to make sure they have on-site “champions” for their CRMs. At TLG, that’s Tyler Cravens, who serves as the sales support person at the dealership. “That has been a game changer,” Berg says. “Having a dedicated champion is well worth the investment.”

A part of Cravens’ responsibility is to train new hires on the CRM. “About three months ago, we hired a new rep,” Cravens says. “I walked him step by step through Sherpa — ‘Here’s how you input customer information. Here’s how you place an order. Here’s how you go through the sales stages.’ If there are any questions, the reps usually come to me. If I don’t have an answer, I’ll reach out to White Cup directly. Their support is really good. They respond quickly to anything that I need.”

For the owner and manager in a smaller dealership only now searching for a CRM, Berg advises making sure the CRM integrates with the dealership’s ERP and is industry specific. “Make sure it handles everything — from proposals to rep activity to customer information,” he says. “Plus, make sure you talk to others whose dealerships are the size of yours about their CRMs; get those referrals.” ■

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CRM Survey Results

Office Technology magazine surveyed BTA’s dealer members about the use of client relationship management (CRM) software in their dealerships. Following are the questions and the results from the 97 respondents. Additional dealer comments can be found on page 16 and on the Executive Director’s Page on page six.

(1) Which CRM do you use in your dealership?

- AgentDealer: 11.34% (11 responses)
- SalesChain: 33.02% (33 responses)
- Sherpa CRM by White Cup: 27.84% (27 responses)
- Other (indicate product name): 26.8% (26 responses)

Other product names listed included: ACT Premium, Ascelerate by ECI, ConnectWise Manage, FORZA/SAP, HubSpot, Microsoft Dynamics 365, monday sales CRM, Pipedrive, Soaring by Falcon, Tigerpaw and Zoho.

(2) How long have you used your present CRM?

- Less than one year: 13.4% (13 responses)
- One to three years: 25.77% (25 responses)
- Three to five years: 9.28% (9 responses)
- More than five years: 51.55% (50 responses)

(3) Which of the following best describes the extent to which your dealership utilizes your CRM for marketing, quoting, data mining, relationship management, automated processes, etc.? (One respondent skipped this question.)

- We are using our CRM at far less than its full potential: 40.63% (39 responses)
- I am generally satisfied that we are using many of our CRM’s capabilities at a respectable level on a daily basis: 51.04% (49 responses)
- We have fully optimized the use of our CRM and its capabilities: 8.33% (8 responses)

(4) How would you characterize your CRM software vendor in terms of its level of support, guidance, training and receptivity to recommendations for improvement?

- Less than satisfactory: 18.56% (18 responses)
- Satisfactory: 43.3% (42 responses)
- Very good: 25.77% (25 responses)
- Excellent: 12.37% (12 responses)

(5) How satisfied are you with your CRM, in terms of its functionality, ease of use and contribution to your dealership’s sales success?

- Less than satisfied: 27.84% (27 responses)
- Satisfied: 52.58% (51 responses)
- Very satisfied: 19.59% (19 responses)

(6) Which of the following best describes your sales team members’ commitment to utilizing your CRM on a daily basis?

- It’s an uphill battle that is “hit and miss” in terms of our sales reps using the CRM on a daily basis: 35.05% (34 responses)
- I am generally satisfied with the level of usage of our CRM among our sales reps: 47.42% (46 responses)
- I am very pleased with my sales team members and can say that they fully embrace the use of our CRM: 17.53% (17 responses) ■

BTA Survey: Dealers' General Comments on CRMs

"[CRMs are] great tools, but only as valuable as the users and organizations make them. It is only as good as what you put into it."
Matt Nix, president
Duplicating Products Inc., Gainesville, Georgia

"I believe it has helped us get more sales data from our ERP software along with our leasing vendors."
DJ Hastings, president
Hogland Office Equipment Inc., Lubbock, Texas

"I view a CRM as a place to hold information on prospects and clients. Ours is a cloud offering and works great for that purpose. It's also very inexpensive; only $10 per user per month."
Reena Philpot, sales manager
Precision Duplicating Solutions, London, Kentucky

"All CRMs have their advantages and disadvantages, pros and cons. SalesChain is good and should do what we need it to do. The most important issue is to commit to a good CRM and optimize its capabilities."
Tom Harrison, COO
UTEC, Ann Arbor, Michigan

"We moved from Sherpa CRM to (browser-based) SalesChain for support and mobility, and have been very pleased with the decision."
Erik Skadberg, president
CPI Business Solutions, Lafayette, Indiana

"CRM use is great and expected. But when it is used as a hammer to micromanage representatives, that is when it fails and also why it has a bad reputation now."
Brian Bence, director of sales
Shenandoah Valley Office Equipment Inc., Verona, Virginia

"Are there any AI options that could make CRM usage more successful?"
Gordon Stapleton, vice president/CFO
Quality Digital Office Solutions, Mt. Joy, Pennsylvania

"CRMs are as good as the data input by the reps and the reps' ability/willingness to follow through the process. More data doesn't mean more sales. Quality versus quantity."
John Kerling, CEO & vice president
United Business Systems, Buffalo, New York

"With AI and how it's evolving, I don't think any interface will matter in the near future. You will speak and it will go into the correct account in the CRM."
Tim Ducat, director of sales
Smart Technologies of Florida, Melbourne, Florida

"I tried a few CRM systems. I found SalesChain to be the best."
Stephen Valenta, president/owner
Offix, Gainesville, Virginia

"Do not get stuck with only things that interface with ECI. Many people mistakenly believe they must integrate with e-automate when, in reality, the true value of a CRM lies in its potential for marketing and sales impact on the business. Buy and use the best tool, not the best integration. [A CRM should provide:]

"Customer Insights: A CRM provides valuable customer data and analytics for a deeper understanding of customer preferences.

"Personalized Marketing: Enables tailored marketing campaigns, boosting engagement and conversions.

"Sales Efficiency: Streamlines sales processes, automates tasks and enhances sales team productivity.

"Data Security and Compliance: Prioritizes data security and ensures compliance with privacy regulations.

"Scalability and Integration: Adapts to business growth and integrates seamlessly with other tools for enhanced efficiency."
Jeffrey Cousins, CEO/founder
Kraft Business Systems Inc., Caledonia, Michigan

"We have tried several CRMs with weak results. They were expensive, time consuming and sales representatives did not utilize them properly. We are currently using independent tools to help with normal CRM tasks."
David Anderson, president
Anderson Business Technology, Pasadena, California

"BDT's [Budget Document Technology's] sales reps embrace our SalesChain system. The integrations with e-automate and leasing partners work very well in providing real-time information to our reps. The vice president of sales provides continuous refresher training and new features relevant to the team every quarter. Management holds reps accountable for using the CRM to its fullest and it shows, as all reps at BDT exceed 100% of annual quota."
Tom Ouellette, president
Budget Document Technology, Lewiston, Maine

"It feels like CRMs are being very responsive versus innovative when it comes to development and the use of CRMs in the sales world. If we're going to attract younger generations into this industry, we need to use CRMs that are fun to use."
Eric McIntosh, senior vice president
WiZiX Technology Group Inc., Roseville, California

"We are moving away from an external/third-party integrated solution, as well as our core solution — e-automate — and replacing the whole lot with one app to cover all areas of the business."
Ron Hulett, president & CEO
U.S. Business Systems Inc., Elkhart, Indiana

"[A CRM is] extremely important to the movement of information within the dealership. Integration with all aspects of the business is also extremely important."
Tim Renegar, president
Kelly Office Solutions, Winston-Salem, North Carolina

"We've looked at other options, but as a small dealership, the costs (real and soft) are too much for us to make the jump [to another CRM]. The White Cup support people are very good, and I'm pretty satisfied with their training platform and functionality of the product."
Paul Knoff, sales director
Bauernfeind Business Technologies, Marshfield, Wisconsin

"This feels obvious, but a CRM is only as good as the people who use it (or don't use it). It is definitely a constant battle with sales reps to get them to use anything to its full extent."
Michael Kenny, president & CEO
U.S. Copy Inc., New Orleans, Louisiana ■