



Compass ShERPa...The ERP for your Sales Team

Bob Treitel
Senior Regional Sales Manager
Compass Sales Solutions

Jim McMeel
Vice President of Sales
Compass Sales Solutions



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Compass Sales Solution: A Brief History

- Founded in 2001 by President, Troy Casper
- Focused exclusively on the imaging channel and sales process automation
- Over 400 dealers around the globe (US, Canada, UK, and Australia)
- Entire Management Team came from the independent dealer channel and represent over 230 years of industry experience
- Aligned with the leading providers in the channel to provide the dealers a comprehensive, turn key solution
- Our core product, Sherpa, was created, initially, as strictly a Managed Print tool (before MPS was really known)
- The design of Sherpa is eliminate the pain points in the MPS engagement process for our dealer partners...

Key Decision Points that all dealers must consider when evaluating a new sales tool...

Will My Reps Use It?

Will it Make Money For My Dealership?

COMPASS INCREASES PRODUCTIVITY

COMPASS INCREASES SALES

COMPASS INCREASES PROFITS



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Key attributes that impact those questions...

Will My Reps Use It?

- 1. Do they see it as a true tool or just an electronic leash or rolodex?*
- 2. Does it make their job easier?*
- 3. Does it cater to how they do business (not be tethered to a computer)*
- 4. Does it integrate with Outlook?*

Key attributes that impact those questions...

Will it Make Money For My Dealership?

- 1. The goal of sales automation is to improve processes, client retention, insure profitability and consistency in pricing, reinforce existing branding, new business development, etc. All of which can specifically drive increased revenues.*
- 2. Industry Specific ROI Indicators*
 - Lease Portfolio Management*
 - MPS assessment, contract analysis and management*
 - Shortening the time between an order written and an order invoiced/collected*
 - Simplifying the management of pricing, commission calculation and workflow, which results in retaining “happy” reps!*

As e-automate/OMD/LaCrosse is the back end ERP of your dealerships, Compass is the Sales ERP!

Sales ERP Reality....

- *Activity tracking is a small component of Sherpa. Our objective is to automate virtually every process a rep goes through*
- *Sherpa helps identify, analyze, configure, propose, populate paperwork, has bi-directional Outlook Integration and can be accessed via their Smartphone or Tablet via browser from the field*
- *MPS assessments with populated dealer branded paperwork to display current client spend , proposal generation complete with all contracts and forms needed to finalize a new transaction.*
- *All orders pushed direct into e-automate from the Compass Proposal module*



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Rep Adoption: The End-Game

- *Is it a hammer or is it a tool?*
- *Does it provide me with opportunities I might otherwise have missed?*
- *Does it make me more money?*
- *Does it make my job easier?*
- *Does it “fit” with how I do business?*
- *Does it consolidate and integrate my business practices?*

The Case for Sherpa....

- *Is it a hammer or is it a tool?*
 - *SHERPA IS THE TOOL THAT ASSISTS EVERY ASPECT OF THE SALE*
- *Does it provide me with opportunities I might otherwise have missed?*
 - *ENHANCED DATA MINING, LEASE PORTFOLIO MGT., EA INTEGRATION*
- *Does it make me more money?*
 - *FINANCIAL MODELING, EASE OF MPS ANALYSIS/STRUCTURING*
- *Does it make my job easier?*
 - *BI-DIRECTIONAL INTEGRATION WITH OUTLOOK, PAPERWORK/PROPOSAL GENERATION, CLIENT INFO AT THEIR FINGERTIPS*
- *Does it “fit” with how I do business?*
 - *I DON'T WANT TO BE TIED TO A LAPTOP.... I WANT TO USE MY SMARTPHONE OR TABLET*
- *Does it consolidate and integrate my business practices?*
 - *NO NEED FOR SEPARATE PRICE LISTS, RATE CARDS, PILES OF FORMS AND PAPERWORK, CONFIG PAGES WITH NOTES ON THEM, ETC.*

A day in the life of a sales rep....



- **7am Starbucks**
 - Use SherpaGo to review days activities, callbacks, etc.
- **8am Sales Meeting**
 - Pull up forecast from Sherpa and Sales Stages Report
- **9am customer calls with service issue**
 - Pull up e-automate information on their smartphone to see service calls, response time, etc.
- **10am Current Customer visit**
 - Review lease information from Lease Tracker to uncover current lease status
- **1pm Prospective Customer Presentation**
 - Generate proposal for prospect using Compass and their dealership vertical market template. No problem since all pricing, lease rates, etc. are loaded in to Compass
- **3pm Assessment Walk Through**
 - Get DCA data (FM Audit, PrintFleet, etc. and import in seconds in to Compass)
- **4:30pm Closing Appt..**
 - Generate sales paperwork, leases, maintenance agreements via Compass



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Let's look at the following and how Compass will “win over” your reps....and YOU!

FOR THE REPS....

- ❖ **SHERPA NAVIGATOR DATA MINING TOOL**
- ❖ **SHERPA LEASE TRACKER**
- ❖ **SHERPAGO MOBILITY SUITE**
- ❖ **SHERPA BI-DIRECTIONAL OUTLOOK INTEGRATION**
- MPS ASSESSMENTS – will find new sale opportunities**

FOR MANAGEMENT...

- ❖ **EASE OF MAINTAINING REP PRICING**
- ❖ **INTEGRATION WITH EA AND OTHER KEY IMAGING INDUSTRY SUPPLIERS (AFTERMARKET, LEASING COMPANIES, DCA TOOLS, ETC.)**
- ❖ **SUPPORT FOR AND REINFORCEMENT OF YOUR BRAND THROUGH CUSTOMIZED, DEALER SPECIFIC REPORTS AND TEMPLATES**

FOR THE ORGANIZATION...

- ❖ **VISIBILITY TO UN-MANAGED DEVICES**
- ❖ **ENHANCED DASHBOARDS WITH DRILL DOWN FUNCTIONALITY**
- ❖ **ONE STEP “CLICK” ACCOUNT REVIEWS**
- ❖ **ENHANCED MOBILE FUNCTIONALITY WITH GPS LOCATION REPORTING**



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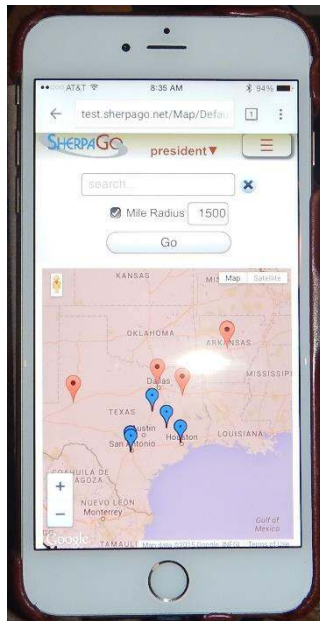
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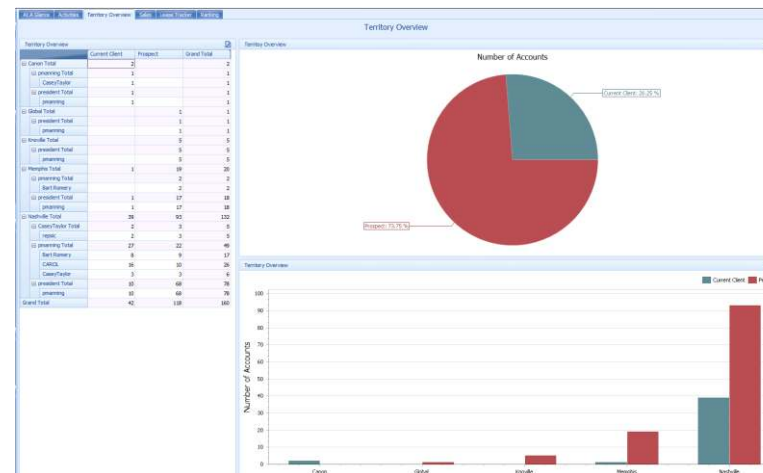
NEW FEATURES



- SherpaNSR (no server required) via Microsoft Azure



- SherpaGo GPS Functionality



- Enhanced Dashboards

Boise Children's Foundation
Account Review
3/10/2015
Review & Action Plan



Idaho Copier
Tiffany McKain-Rasmussen

- Click to populate professionally created account reviews



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NEW FEATURES



CAPTURING UN-MANAGED DEVICES FROM YOUR METER COLLECTION TOOL!

MAXIMIZING YOUR MIF TO EXPAND BASE PENETRATION			
1	How many MFP's do you have in the field?	3,000	(plug in the total number of MFP's you have in the field)
2	What percentage of these are reporting electronically?	50%	(plug in the % that are reporting meters electronically so you can invoice them for maintenance)
3	What do you view as the ratio of printers to MFP's in the field:?	5	(plus in whatever ratio you feel is relevant in your market(s))
4	What is the average selling price of your typical MFP?	\$6,000.00	(plug in the average selling price for your dealership of a typical MFP)
5	What % of the printers in the field within your customer base could potentially be optimized?	4%	(How many of those printers that are being sent to you, not under contract, via the DCA tool, that are potentially optimization targets that you don't know about since the focus is on just billing the meters for the MFP's you are servicing)

SUMMARY RESULTS:	
NUMBER OF ELECTRONICALLY REPORTING MFP'S IN FIELD:	1,500
NUMBER OF UN-CONTRACTED PRINTERS FOR THE ABOVE LISTED MFP'S:	7,500
POTENTIAL NUMBER OF OPTIMIZATION OPPORTUNITIES:	300
ADDITIONAL REVENUE GENERATED IF YOU CONVERTED THESE TO MFP'S:	\$1,800,000.00



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ezMPS: SIMPLIFYING MPS



Address
Name: Jerry's Print Shop
Address: 300 N. Meridian
City: Indianapolis
State: IN Zip: 46204
County: Website: Phone: Fax:

Main Contact
First Name: Bill
Last Name: Bellichek
Title: Owner
Send E-Mail: bill@jerrysps.com
Work phone: Ext: Mobile Phone: Fax Number:

Notes
Wants to outsource his fleet management. Tired of handling it internally

Steps: Step 1 Step 2 Step 3 Step 4 Step 5 Step 6

Step 1: Prospect Qualification
Estimated number of printers:
Estimated monthly expense \$:
Contact Qualification: C level or has specific P&L responsibility?
Name: Title:
Name: Title:
Save

Benefits of an Assessment

- You will receive a detailed inventory of your fleet and all related expenses
- It will require almost zero involvement of your staff
- The results of the assessment will likely save you money whether you contract
- There is no cost or obligation for the assessment. It is a tool to determine if an opportunity exists for both parties to explore further

Resource Center

Pre-Analysis

Meter Import



Pro Dealer Group Mapper 1 - Add Printers 2 - Adjust Costs 3 - Finalize Printers 4 - MPS Contract 5 - Reporting

Add Printers
Add from Printer List
Meter Import
Manual Printer

Meter Import
Printer: FMAudit Central
Work Days:

FMAudit Login
Email Address: josh@compasscontact.net Start Date: 2/14/2013
Password: ***** End Date: 3/16/2015
Lead Months:

Printer List

Printer	Volume	CPI	Price	Savings	Savings %
1/6/2014 6:27:35 PM					
1/7/2014 6:27:37 PM					
1/6/2014 6:27:42 PM					
1/5/2014 6:27:35 PM					
1/4/2014 6:27:35 PM					
1/3/2014 6:27:34 PM					
1/2/2014 6:27:38 PM					
1/1/2014 6:27:24 PM					
12/31/2013 6:27:26 PM					
12/31/2013 11:11:03 AM					

Proposals/Contracts/Forms



Report Options

Assessment
☐ TCO Details
☐ TCO Meter
☐ TCO Summary
Sorting:
☒ Default Sorting
☐ First Sort
☐ Second Sort
☐ Third Sort
Generate

Proposal / Contracts
☐ + Gold Contract 2014
☐ + Platinum Contract 2014
☐ + Pooled Proposal No References 2014
☐ + Pooled Proposal w References 2014
☐ 1 - Proposal With References
☐ 2 - Proposal No References
☐ 3 - Platinum - Individual Contract
☐ 4 - Platinum - Consolidated Contract
☐ 5 - Gold - Individual Contract
☐ 6 - Gold - Consolidated Contract
☐ Bronze Printer Care Agreement
Generate

Stock
☐ Service Rates
☐ Executive Summary
Generate

Processing / Mgt. Reports
☐ 1 - Cover Page
☐ 2 - Schedule A
Generate
☐ MPS Contract Pricing Details Rep
☐ MPS Contract Pricing Summary Rep
☐ MPS Contract Pricing Details Admin
☐ MPS Contract Pricing Summary Admin
☐ MPS Vendor Report Admin
Generate

Resource Center

Current and Future State



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Thank You

Jim McMeel

Vice President of Sales

317-843-9798

jim@compasscontact.net

Bob Treitel

Regional Sales Manager

(603) 571-5857

bob@compasscontact.net

www.compasscontact.net

www.ezMPS.net



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