

# Increasing Sales Performance Using Mobile Technologies

The business benefits  
of social ERP

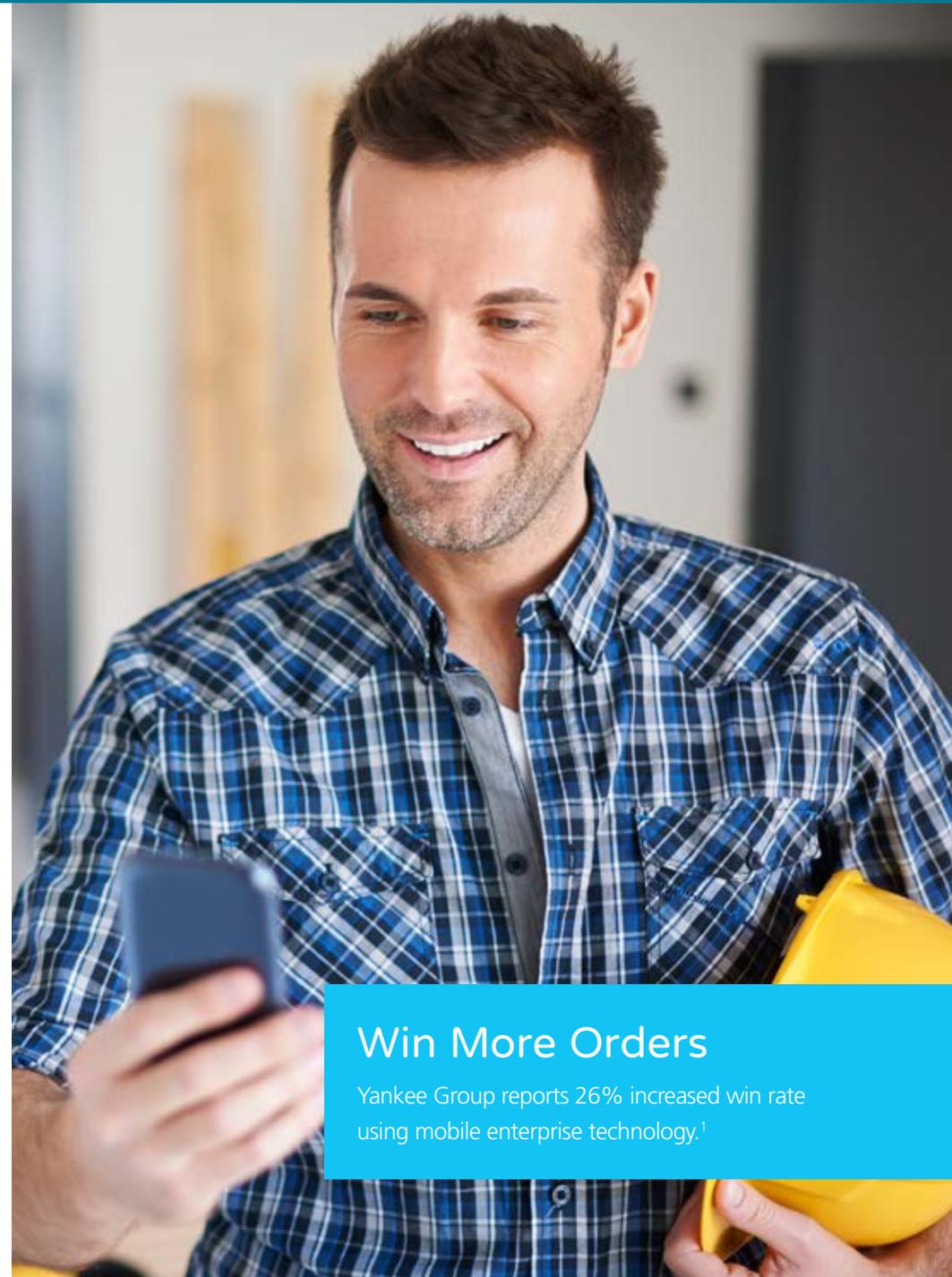


**EPICOR**

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<sup>1</sup> Yankee Group, *Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey*.



### Win More Orders

Yankee Group reports 26% increased win rate using mobile enterprise technology.<sup>1</sup>

# Mobile sales technologies can turn go-betweens into top sales people

For most lumber and building materials (LBM) dealers and distributors, their outside sales people are critical to the success of their company. As the company's eyes and ears on jobsites, outside sales people often find opportunities and foster the company's relationships with key contractors and builders, architects and other construction supply companies.

Yet, what tools do we typically give these road warriors? A sales quota, a car, a cell phone, and pen and paper. Ill-equipped and without access to the business management systems running at the branch office, outside sales people can sometimes be little more than a go-between responding, "Let me call in and find out," or "I'll get you the answer when I'm back in the office." Notes are scribbled on paper. Responses and quotes are delayed. And sometimes sales are lost because of delays and forgotten follow-ups.

Missed opportunities. Lost sales. Disappointed customers. Those hit your top line hard. Fortunately, your top line can be just as easily buoyed by improvements in sales productivity.

For years, LBM business management systems have helped increase productivity in the back office. In this Epicor Best Practices brief, you'll read about the significant effect that mobile sales and CRM technologies, connected to a comprehensive LBM business management system, can have on sales performance.

Nucleus Research reports mobile CRM is effective in driving ROI on CRM investments.<sup>2</sup>

- ▶ 74% respondent adoption
- ▶ 15% average increase in sales productivity
- ▶ >20% increase in sales productivity reported by one third of respondents



<sup>2</sup> Nucleus Research, *Market Force Report—The Value of Mobile and Social for CRM*, March 2012.

# Make all your sales people top performers

The Yankee Group findings (see inset) confirm that mobile and cloud technologies can play a significant role in improving sales performance, especially when mobile technologies are tied into your business systems—CRM, inventory management, accounting, and transaction processing.

But what do we mean by mobile sales and enterprise technologies? It's more than storing contacts on your mobile device, or being able to sign in and check stock.

Here's what Epicor BisTrack Cloud could mean to you:

- ▶ **Mobilize and connect.** BisTrack Cloud enables outside sales people to connect to your Epicor BisTrack system so that they can be as informed and productive at a jobsite as they are at their desk.
- ▶ **Automate the sales process.** BisTrack Cloud automates the field sales process—from tracking opportunities in the pipeline, to presenting individualized, calendar-driven to-do lists on tasks such as following up on outstanding quotes and credit issues, to placing orders right at the jobsite.

- ▶ **Enable on-the-spot customer service.** BisTrack Cloud empowers your sales team to provide responsive customer service while reducing the workload on back office staff to provide product and stock information, copies of documents, or to check delivery status or fine-tuning delivery requirements. With just two touches, your sales rep can view the status of an order, check inventory, and answer questions in realtime.
- ▶ **Integrate with office systems.** Moreover, BisTrack Cloud integrates the information entered by the field sales force at the jobsite to alert colleagues about important opportunities and issues, and to help forecast demand for financial and operational planning.

The next sections will give specific examples of how Epicor BisTrack Cloud can make all your outside sales people more productive and effective. As you read, try to imagine the results your sales people will be inspired to achieve.

## Yankee Group reported improved sales metrics using mobile enterprise technologies.<sup>3</sup>

- ▶ 26% increased win rates
- ▶ 28% increased field selling time
- ▶ 25% increased forecast accuracy
- ▶ 27% eliminated redundant activities
- ▶ 25% reduced sales call costs
- ▶ 24% decreased administrative time

Epicor® BisTrack™ Cloud is mobile LBM sales software that enables a dealer's outside sales people to manage their customer relations from their smartphones, tablets, and laptops. Make it easier and faster for a sales person to focus their time on nurturing prospects in their pipelines, to stay in touch with existing customers, and to place orders wherever they are.

<sup>3</sup> Yankee Group, *Anywhere Enterprise: 2010 U.S. Enterprise Mobility/Empowered Employee Survey*

# Connect and prompt sales people to win more orders

Mobile technologies such as BisTrack Cloud can be the foundation of a strategy to make sure that outside sales people are as informed, responsive, and helpful in the field as possible—to close orders faster whether with new or existing customers.

Here are some of the specific ways that Epicor BisTrack Cloud mobile sales software will help your outside sales people be more effective:

Provide quick responses. Don't give contractors and builders time to check with your competitors. With access in the field to real-time inventory and product information, pricing that includes any pre-negotiated discounts, ordering history, and much more, your outside sales people can quickly provide the information that allows customers to make decisions on the spot.

Track and follow up on opportunities. Use Epicor BisTrack Advanced CRM to monitor building permits, contractor proposals, and other opportunities. Follow up on opportunities using BisTrack Cloud on the road, so that you don't miss the chance to quote.

Generate and email quotes from the jobsite. Respond to quote requests on-the-spot and email the quotes to get customer approval while you're still there to discuss it. Imagine how much faster you can help someone on

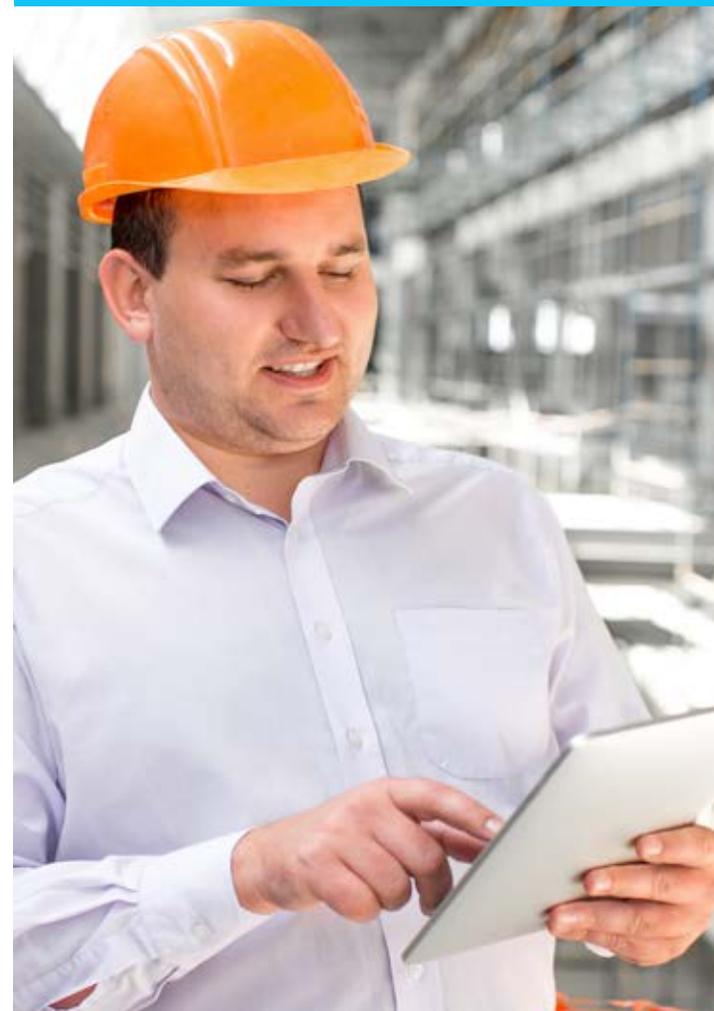
the jobsite that needs materials, but has to go through their purchasing staff to approve the order.

Remind sales people to follow up on quotes. Epicor BisTrack Cloud can put individualized lists of outstanding quotes and follow up activities at their fingertips no matter where they are.

Order product from your mobile device. Create orders on the jobsite, a convenient service for a customer's last-minute needs or quick add-on orders often resulting in incremental pull-through sales. The faster and easier your company is to do business with, the more you'll sell to your best customers.

Show how easy it is to use your self-service mobile and web tools for contractors. Sales people can also demonstrate BisTrack Web Track and Web Track Mobile to show contractors how they can place orders and view account information themselves.

How many of us have bought building supplies from the only guy who called back? Follow up is a surprisingly simple, yet effective sales process. One Epicor BisTrack customer tripled (tripled!) their quote conversion rate simply by reminding sales people to follow up on outstanding quotes.



# Increase field selling time and productivity

When outside sales people don't have to drive back to the office to complete their duties, they have more time to spend face-to-face with customers.

Here are some of the ways that Epicor BisTrack Cloud helps mobilize your sales team to be in the field where they can be most effective:

- ▶ **Get to jobsites faster.** With customer jobsite addresses lined to mapping apps, sales people get where they need to go faster.
- ▶ **Set relevant and forward-moving meeting objectives.** Review customer history, open orders, opportunities, credit issues etc., on a smartphone, tablet or laptop prior to customer meeting to be able to set objectives to take an opportunity to the next stage of the sales cycle.
- ▶ **Give customers answers on-the-spot.** No need to call back to the office, or drive back to check stock or prices, enter quotes and orders, installation instructions and MSDS sheets. Everything a sales person needs is at their fingertips with BisTrack Cloud.

- ▶ **Record notes directly into the customer contact file** during the meeting, so that the notes are visible to anyone accessing the order for followup or fulfillment.
- ▶ **Onto the next customer.** Administrative tasks can be done in the field with BisTrack Cloud, so that outside sales people can get onto the next meeting without delay.

BisTrack Cloud makes sales calls with new prospects faster and more productive. Further, fewer sales meetings and jobsite visits will be needed to make a sale when meetings are more productive. That's why not only is sales more productive, but the total cost of selling is reduced using BisTrack Cloud mobile sales software.

Increase productivity with touch-optimized, web-enabled functionality, such as one-touch dial or compose, jobsite addresses and links to mapping apps, and integrated with customer's account and order information. This functionality available in the touch-optimized BisTrack Cloud mobile sales software.



## The art of sales management: sell more without adding more sales people

All the things you do as a sales manager are now available to you while on the road. With BisTrack Cloud, you can receive alerts about low margin, credit issues, or rush approvals. You can monitor sales and margin on a daily, monthly, or year-to-date basis. You can track budget versus actual revenue. Create personalized dashboards filled with the information you need to manage your team and quotas, displayed in easy-to-read graphs and lists. And now, with BisTrack Cloud, that critical information is available to you on the road.

It's easy to capitalize on the competitive nature of your sales force and motivate them to sell more. With BisTrack Cloud, you can set up real-time dashboards on their mobile devices to show them how close they are to reaching their quota, and how their sales rank relative to other sales people. Dealers report significant increases in revenue and margin by revealing real-time sales data to their sales team.

As a sales manager, Epicor BisTrack Cloud also gives you tools to analyze the performance of individual sales people, and develop plans to support and improve their sales techniques.

- ▶ **Track opportunity and quote followup.** Monitor each sales person's sales pipeline by tracking the number of opportunities and outstanding quotes, as well as followup activity.
- ▶ **Track quote conversions,** to both wins and losses, broken down by sales person.
- ▶ **Categorize wins and losses** to better understand where you're successful and develop strategies to improve win rates.

With BisTrack Cloud, sales managers can have a bird's eye view of their sales team's activities and performance.

“75% of organizations with social ERP have a fully integrated view of all customer information in comparison to 28% of organizations without social ERP.”

*Bob Sanford, Owner, Sanford and Hawley*

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# Gain corporate insight and ancillary efficiencies with mobile sales software

When your mobile sales people are connected and integrated with your corporate systems, other functions also benefit from efficiencies and intelligence.

## Branch sales and administration efficiencies

Your back office and counter staff will be more productive too, because the outside sales team won't have to call in to request information, quotes, and order status.

Counter staff have more time for customers coming into your branch locations.

Support staff can concentrate on order fulfillment instead of continually reacting and getting answers for sales people.

Bottlenecks can be eliminated as single sources of information are made available to everyone.

Response time and customer service levels can improve for customers both at your branches and at their jobsite.

With less redundant data entry and fewer people handling requests for information, everyone works more efficiently.

More efficient staffing means you can support growth without adding additional support staff.

## Improved operations and financial planning from better forecast accuracy

From an operations and financial management point of view, a mobilized and connected sales team can provide insight into upcoming demand to help plan procurement, manufacturing, and requirements for capital and human resources.

With mobile devices in hand, it's easier for sales people to update the BisTrack Opportunities module while in a meeting or soon after while it's fresh in their minds, making it easier for sales managers to gauge the probability of success for the opportunities in each sales person's pipeline and relay that information to operations and financial managers.



# Set up mobile sales technology rooted in sound business information

According to Aberdeen Research, 23% more firms meet team sales quotas when a sales mobility strategy is employed.<sup>4</sup> The corollary is that mobile sales teams are most effective when supported by a comprehensive business management system and integrated sales, marketing and customer service systems that help you identify your best customers and foster loyal customer relationships.

Here's how Epicor can help integrate your business information to help you manage customer relations:

- ▶ CRM and SFA. Customer relationship management (CRM) and sales force automation (SFA) are no longer just for Fortune 500 companies. They are paramount to ongoing success of a business, regardless of its size or business type. Companies that are “best-in-class” at aligning marketing and sales departments had a 20% average growth in annual revenue, compared with a 4% decline among “laggard” organizations, according to Aberdeen Research.
- ▶ Epicor BisTrack CRM, now available in the BisTrack Cloud platform, integrates customer contact management and opportunities tracking with Microsoft® Outlook® to support email marketing. Sales people or marketing staff can easily email groups of customers about new products, events you're hosting, or simply ask what projects they have coming up.

- ▶ Business Intelligence, Analytics and Customer Stratification. For managers, having business intelligence on the road with you means never losing sight of priorities, issues, and opportunities. With dashboards displaying real-time business information and internal messaging alerting you to system triggers, you're always on top of things.
- ▶ Moreover, analysis tools such as Epicor BisTrack Customer Stratification—which helps you categorize customers based on loyalty, buying power, cost to service, and profitability—provide valuable insight to guide you in how to foster and improve customer relations.

Epicor software can provide the fundamentals of business management and business intelligence needed for smarter sales management and effective outside sales people. Enabling mobility takes effectiveness and productivity to the next level.

<sup>4</sup> Aberdeen Research, Peter Ostrow, *Sales Mobility: Quotas Untethered*, Nov 2010.



# Gain competitive advantage and differentiation

The top line and bottom line benefits of an outside sales team mobilized by BisTrack Cloud are numerous: including optimized use of resources, improved sales effectiveness resulting in higher win rates and sales revenue, and more efficient processes that contribute to higher profitability.

In addition, mobile technologies can help you stand out from the other suppliers so that contractors and builders choose your company as their preferred supplier. Here's how:

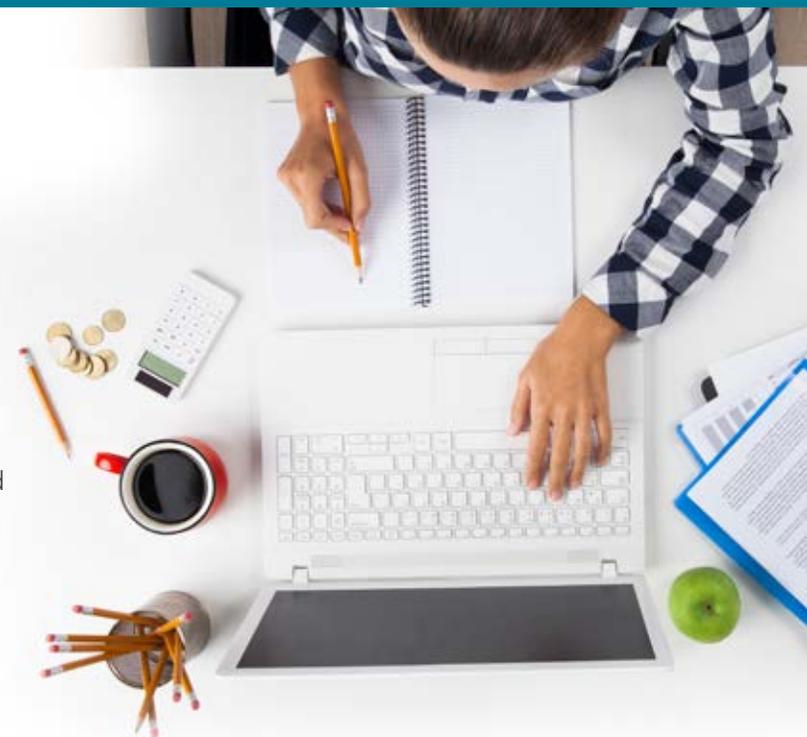
Earn customer loyalty by quickly finding product and stock information. When they get the information they need quickly from your sales person, there's a good chance they won't look any farther.

Distinguish your company with mobile and web-based convenience. Demonstrating how easy it is for contractors to use mobile and web-based tools to get self-service answers even when you're not around speaks volumes about how your business caters to its customers. Sales people can use their mobile devices to show contractors how to get account information on a company-branded online account portal, or to place an order on the your online store.

Impress customers with your company's use of productivity technologies. When they see your sales team mobilized and connected, they're more likely to assume your entire company is optimized for efficiency, from supply chain through to delivery.

From tangible business benefits to the appeal of dealing with a supplier that embraces technology to provide higher levels of customer responsiveness and efficiency—BisTrack Cloud differentiates your company from the other suppliers out there, and provides a distinct competitive advantage to win more orders at a lower cost of sales.

Try it for yourself and find out. It won't take you long to see the difference.



**If you're looking for an ERP system that drives social collaboration and innovation, we should talk. Interested in learning more about Epicor ERP 10?**

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 +1.800.999.6995

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 www.epicor.com

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## About Epicor

Epicor Software Corporation drives business growth. We provide flexible, industry-specific software that is designed around the needs of our manufacturing, distribution, retail, and service industry customers. More than 40 years of experience with our customers' unique business processes and operational requirements is built into every solution—in the cloud, hosted, or on premises. With a deep understanding of your industry, Epicor solutions spur growth while managing complexity. The result is powerful solutions that free your resources so you can grow your business. For more information, [connect with Epicor](#) or visit [www.epicor.com](http://www.epicor.com).



Contact us for more information on Epicor Products and Services

+1.800.999.6995 [info@epicor.com](mailto:info@epicor.com) [www.epicor.com](http://www.epicor.com)

### Corporate Office

804 Las Cimas Parkway  
Austin, TX 78746  
USA

Toll Free: +1.888.448.2636  
Direct: +1.512.328.2300  
Fax: +1.512.278.5590

### Latin America and Caribbean

Blvd. Antonio L. Rodriguez #1882 Int. 104  
Plaza Central, Col. Santa Maria  
Monterrey, Nuevo Leon, CP 64650  
Mexico

Phone: +52.81.1551.7100  
Fax: +52.81.1551.7117

### Europe, Middle East and Africa

No. 1 The Arena  
Downshire Way  
Bracknell, Berkshire RG12 1PU  
United Kingdom

Phone: +44.1344.468468  
Fax: +44.1344.468010

### Asia

238A Thomson Road #23-06  
Novena Square Tower A  
Singapore 307684  
Singapore

Phone: +65.6333.8121  
Fax: +65.6333.8131

### Australia and New Zealand

Suite 2 Level 8,  
100 Pacific Highway  
North Sydney, NSW 2060  
Australia

Phone: +61.2.9927.6200  
Fax: +61.2.9927.6298

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