WHITE PAPER

How to Build a Successful Sales and Quoting System for Hotsy Equipment Dealers

Presented by:
Ayers Technology Corporation

Introduction

How do you manage the sales and marketing processes for a business with several locations without spending a fortune? Especially when you have potentially thousands of prospects and customers in each location, complicated products that are difficult to quote, and limited communication bandwidth between sites?

In 2011 Hotsy Carlson Equipment Company decided to address this problem head-on. Located in Austin, Texas, Hotsy Carlson is a cleaning system distributor with sales and service offices in Austin, Bryan, Killeen and Cuero. Started in 1974, Hotsy Carlson has evolved into one of the fastest growing retailers of commercial pressure washers and related equipment in the state.

This White Paper documents both the challenges and solutions that were designed to address the issues that Hotsy Carlson experienced.

Table of Contents

Problem 1: Managing the sales process

Hotsy Carlson wanted a system to manage their sales process. With multiple locations and no centralized method or system in place, it was difficult to get a handle on the sales pipeline or even the sales activity that was taking place. There was no means of keeping up with the 'who said what to whom' that goes on in sales and is vitally important to the organization.

Issues Presented
1. Any new system would have to be able to be used in multiple locations, with everything ultimately residing in a central database in Austin.
2. It had to have a method of tracking notes, activities and sales opportunities
3. The new system had to be flexible so it could be customized to the way Hotsy Carlson does business.
4. Any new system had to interface with the Business Works accounting software.

Solution: Maximize the use of ACT!

"After looking at several CRM solutions, we decided on ACT! Besides meeting our basic criteria for tracking the things that were important to us, ACT! has several methods of access that we thought would at least work around our connectivity problem: ACT! works over VPN, Citrix, by syncing and it even has a Web interface with the Premium version that we ended up purchasing," says **Renee Schultz**. "And it was about the only CRM product that would integrate with Business Works."

Ayers Technology was brought in to customize ACT!, and set it up for syncing with the 2 other locations. From there training and implementation took place.

Renee: "While the newer versions of ACT! did exactly what we wanted, our Internet communications problems still hampered adoption of the system. We tried both syncing and connection through VPN but the remote offices still had issues. In the main offices, ACT! performed exactly as we planned so we stuck with it and went searching for a solution to the communications issue."

Problem 2: Generating high quality quotes efficiently and accurately

Because Hotsy Carlson sells quality products that are complex in nature, they provide their customers and prospects with written quotes. This is done after working through the sales process and learning what the customer or prospect's requirements are. To ensure the customer is fully aware of what is being proposed, the quotes are detailed in nature, with pictures and spec sheets of the equipment proposed included with every quote.
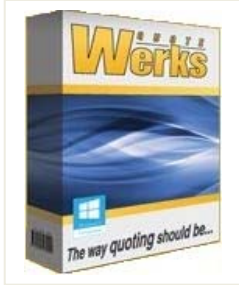
Issues Presented

1. Time consuming process for creating customer quotes:
   a. Excel forms that had to be typed by hand
   b. Pictures of equipment had to be inserted, which caused odd spacing
   c. Brochures for products, Hotsy company info, and lease forms had to be manually attached to emails to customers
   d. Shipping charges and taxes had to be researched
   e. Optional additional products had to be added manually

2. No standardized quoting form for all offices
3. Multiple price sheets, changing yearly, causing inconsistent pricing of equipment and add on packages
4. Shipping charges left off quotes
5. Taxes for different types of products not charged correctly
6. Difficulty with Internet connections in poor reception in remote areas causing salespeople problems accessing the main database for ACT! customer relationship software to enter their prospect and customer information.

Solution: QuoteWerks software – an add-on quoting product that works seamlessly with ACT! customer management software.

"After reviewing our quoting process and the time it took for a sales rep to generate one, Ayers Technology recommended that we look at QuoteWerks software – an add-on product that works seamlessly with our ACT! software." *Bob Schultz, President/CEO of Hotsy Carlson.*

Benefits of QuoteWerks:

- Quote form customized with Hotsy Carlson information including logos and pictures of products. Product pictures automatically populate when the product is chosen for the quote. No manual cutting and pasting of product pictures into Excel quotes.
- Product spec sheets automatically attach to quote when products are selected.
- Company informational page automatically added with every quote that is created: a Why Do Business With Our Company brochure.
- Complicated price sheets can be imported into QuoteWerks. Price levels per type of customer, bulk pricing, etc, can be set up.
- Security controls can be set up so that:
- Management approvals are required before quotes can be either emailed or printed.
- Quotes above a certain dollar level can be flagged as requiring management approval.
- Discounts over __% are flagged for management approval
- Products with optional items that can be sold with them can have a popup box with all the possible options that the salesperson can choose from while doing his quote.
- Products that are frequently sold together in a group can be set up as a "bundle" so that the salesperson doesn't have to select each item individually for his quote.
- QuoteWerks links directly to ACT! software, so that the customer contact info pulls directly from ACT! into the QuoteWerks quote without having to be typed. Customer name, address, phone number, fax etc, all populate into the quote form with one click.
- Optionally, QuoteWerks also has links to accounting software such as QuickBooks, so that quotes can be closed and made into either sales orders or invoices without rekeying them.

"Using QuoteWerks has benefited us in training new salespersons also. It shortens their ramp up time, and by using the Configurator feature, items are not left off the quote for lack of experience. The system prompts you to choose the appropriate hose reel for the specified machine. Trailer registration fees are automatically added in when appropriate."
***Renee Schultz
Hotsy Carlson Equip.***

Renee: "QuoteWerks was exactly the right product for our company. Ayers Technology took our old, Excel generated format as a starting point and customized the forms in QuoteWerks to match what we were shooting for. In addition, they helped us put together a products database so we now have more control over pricing and everybody is quoting from the same source. The final plus was being able to embed pictures and spec sheets with the products. QuoteWerks has reduced the time it takes to produce a quote to just a fraction of that required by our old system."

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Visit our Website: www.ayerstechnology.com

Sample Quote created in QuoteWerks:

QUOTE

Number	T1
Date	Aug 11, 2011

Sold To

Hotsy Carlson Equipment Corp
Bob Schultz
4714 Nuckols Corssing ROad
Austin, TX 78744

Your Sales Rep

Renee Schultz

512442-2267

renee@hotsycarlson.com

Phone
Fax

Line	Qty	Model/PN	Description	Unit Price	Ext. Price
1	1	1812SS	Smart Relay Control Functionality Stationary Hotsy Hot Water Pressure Washer - 5.9 GPM @ 2500 PSI, 10HP 230V/1PH 42 AMP Baldor Electric Motor, NG-Fired, Belt Drive Hotsy Triplex Pump w/NESTechnology, 50' High Pressure Hose, Trigger Gun Shut Off, Shipping	$9,765.00	$9,765.00
2	1	89030740	LP Conversion Kit (Factory Installed)	$111.00	$111.00
3	1	89169880	Soap Solenoid & Switch	$133.00	$133.00
4	1	1075BE	Hotsy Hot Water Pressure Washer - 3.8 GPM @ 3500 PSI, 13HP (389CC) Electric Start Honda Gas Engine, 12 Volt Burner, Belt Drive Hotsy Triplex Pump w/NESTechnology, Optional Portability, Trigger Gun Shut Off, 50' High Pressure Hose, Shipping Weight 665lbs (	$7,065.00	$7,065.00
5	4	HC	labor to install	$442.40	$1,769.60

THE BEST WARRANTY IN THE INDUSTRY

7 YEAR PUMP, LIFETIME MANIFOLD WARRANTY

5 YEAR FACTORY COIL WARRANTY (not prorated)

EXCLUSIVE 4 YEAR MOTOR WARRANTY (OPTIMAX OIL)

LIFETIME LOANER PROGRAM

FULL SERVICE AND WARRANTY STATION

For best results only use Hotsy detergents

SubTotal	$18,843.60
Tax	$1,554.60
Shipping	$0.00
Total	**$20,398.20**

	Term	Payments
Lease	0	$0.00

Terms   **P.O. Number**

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BRYAN / COLLEGE STATION
1605 Gooseneck Dr.
Phone (979) 778-2747
Fax (979) 778-3677

Central Texas' Pressure Washing Experts Since 1974
Customer Satisfaction is Job #1!
www.hotsycarlson.com

Thank you for the opportunity to introduce you to our company. If you need to clean, our pressure washers and parts washers are top of the line. Given below are some valuable reasons to allow Hotsy Carlson Equipment to serve your industrial cleaning needs and waste water projects.

Hotsy Carlson has been serving the Industrial Cleaning needs of Central Texas since 1974.

- Like you, we know the value of **Service, Safety, & Cleanliness.**
- We want to establish a long term relationship with our customers and we are willing to customize our services around your business needs.
- We offer a library of films and books about the industry that you may check out for five days.
- We have a full line of rental units to serve any short term cleaning need.

Water Maze is North America's largest manufacturer of industrial wash-water treatment systems

- We have a full time **Environmental Specialist** on staff that can guide you through system design and set up.
- We are well versed in the areas of waste water treatment, water reclaim, and the constantly changing city, state water discharge ordinances and regulations.

We have a dedicated service department staff that can assist you in many ways

- We will respond to your local service needs within **48 hours**.
- **We carry the largest inventory of parts and equipment in stock and on our service trucks.**
- All repairs can be completed at your site or in our service department.
- We offer an exclusive 90 day warranty on all service.
- You can also purchase your own parts from our large parts inventory
- To avoid downtime, we provide **free loaner** machines to our equipment customers, if we are unable to repair your equipment in a timely manner.

The right training can avoid costly repairs or avoid unnecessary damages to your equipment.

- Each customer receives **complete on-site safety, operational, and maintenance training** for your users is provided by our cleaning consultant.

We manufacture our own line of detergents.

- They are the strongest concentrate and cost effective products on the market.
- **Bulk programs** are available at huge discounts.

Put our experience to work for you. If you need a custom design or application, we can help. The tougher the job the better!

We value your business! Thanks for the opportunity.

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Visit our Website: www.ayerstechnology.com

Problem: Limited data communications between offices slowed the adoption of the ACT! \QuoteWerks solution

The remote stores in Killeen and Bryan were more than willing to adopt new applications and processes but the Internet connections made actually using them almost impossible. Even setting up a Virtual Private Network (VPN) only improved things slightly.
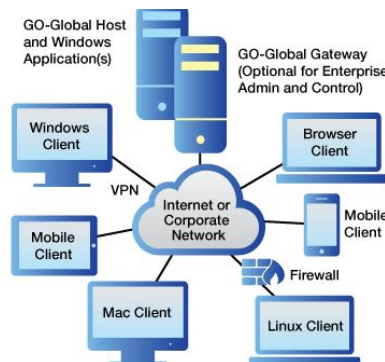
Issues Presented:
1. Any software that was hosted at the Austin headquarters was extremely slow to respond when accessed from a remote office. This included ACT! and QuoteWerks as well as BusinessWerks.
2. Syncing ACT! from the remote offices back to main database worked but the connection speed was so slow the operation would time out before completion.

Solution: GoGlobal Secure Application Access through the Internet

Benefits of GoGlobal:
- Allows secure Web-enabling of any program, including CRM, accounting and quoting software
- Cross platform connectivity allows access through a wide range of devices including laptops, tablets, iPads, and smart phones.
- Extremely efficient architecture maximizes the speed of the Internet connection
- Controls which users can access which applications
- Retains 100% of the application's features, functions and branding

Renee: "GoGlobal was the final piece to the puzzle that made our system work. Up until Ayers Technology brought it to us, we had a very difficult time getting the outlying offices to adopt ACT! and QuoteWerks. The problem was not the applications; it was the speed of moving data back and forth. We tried everything from syncing to VPN and it was just frustrating. With GoGlobal everyone is on board and making the most out of our system.

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Summary

Renee and Bob Schultz chose Ayers Technology to design a sales system for their company which utilized components of the following products:

- **ACT! database software** – to capture information for leads, customers
- **QuoteWerks** – To create a more professional, accurate and consistent quote utilized by all their Texas sales locations. This quoting system cut down the time it takes to create a complex quote from 2 hours to less than 30 minutes!!
- **GoGlobal** software – Solved the slow Internet connection problem experienced by the remote sales locations. It created a secure environment where salespeople could access needed programs in a much faster timeframe.

We would like to thank Bob and Renee for allowing us to share their story and for allowing us to help them fulfill their goals of providing their sales reps with the best tools to do their jobs.

For more information about the system developed for Hotsy Carlson, please contact David Ayers at Ayers Technology Corporation. Our office phone is 512-251-7313 and the email address is dayers@ayerstechnology.com.