



Forge your business into a digital powerhouse

CUSTOMER SUCCESS STORY

PrairieCoast Equipment: Using Visual Sales Pipeline to Achieve Sales Targets

THE SITUATION: WORKFLOW LIMITATIONS

When Jason Nichol arrived at PrairieCoast Equipment, the dealership needed to consolidate its sales pipeline. It tracked sales through two independent systems, neither of which included customer relations management (CRM) capability. Sales reps kept all their customer notes in personal records that existed in notebooks, phone-based notes or just in their own heads.

"I didn't know if the quote was provided to the customer, or if the rep had just generated a quote for reference," Nichol says. "And there was no flow to let me know what stage the quote was at."



*Dealer: PrairieCoast Equipment - British Columbia and
Alberta, Canada*

*User: Jason Nichol, Interior Sales Manager
Anvil User Since: 2019*

PAIN POINTS: SYNCING & REPORTING

With as many as 9 sales people to manage, Nichol spent large portions of each day bouncing back and forth between systems and working the phones, trying to stay on top of quotes his reps had generated and where each stood as it moved through the pipeline.

- **Important customer information was often isolated** in notebooks or memory.
- Lack of a consistent sales pipeline process resulted in **lost details and poor customer communication**.
- **Managers spent valuable time and effort** trying to track the status of deals in the pipeline.
- **Inexact measures of volumes and progress** made reporting and forecasting difficult.

THE SOLUTION: VISUAL SALES PIPELINE

The fast-paced, multi-tasking environment of the sales department led to inefficiencies that slowed the sales process and caused customer communication to suffer. When PrairieCoast decided to invest in a CRM, Anvil App Works stood out because of its Salesforce platform, its dynamic Visual Sales Pipeline (VSP) feature and its responsiveness in addressing the dealership's needs.

"I am very thankful Anvil brought this feature to us. It's the best I've ever had to work with," Nichol reports. "It gives a manager a lot of information that he doesn't have to go asking for or searching for, and I don't have to pepper my sales team with a lot of questions."



Salesforce-based CRM platforms like Anvil App Works have a proven track record of increasing:

by up to
30%

Lead Conversion

by up to
35%

Sales Productivity

by up to
38%*

Faster Decision-Making

* Salesforce Relationship Survey conducted 2014-2016 among 10,500+ customers randomly selected. Response sizes per question vary.

WHAT CAN ANVIL DO FOR YOU?

"I'm able to go into the VSP any time I want and see what anyone on my sales team has invoiced," says Nichol. "Even deals for equipment on the lot tend to move forward more efficiently when everyone can see what is going on."

Anvil's VSP feature affects productivity at every level of your dealership by:

- Taking the effort out of tracking deals
- Increasing accountability throughout the dealership
- Focusing salespeople on customer service
- Empowering sales managers to manage their teams rather than reacting to problems.

Benefits for the Sales Rep

Improve Time Management

"When you put visual cues in front of sales people, they can see what action to take next," says Nichol. "Once it's in the VSP, you've got to manage it. That begins to instill some accountability, which results in better communication and more closure, and, in the end, our customers win because somebody is communicating with them."

Nichol found that Anvil's VSP feature gave his sales team the tools they needed to improve performance. "While working closely with one employee, I found that when he turned the page in his notes, that was it. He just kept turning forward, never back. Think about all the opportunities he was missing."

Digitizing that rep's notebook transformed his performance, according to Nichol. "It took him from average performance to well above average in overall results. His communication improved, and his stress decreased. He stays ahead of the game, now, because he can see his next move."

"All of the time I used to spend researching and chasing answers to questions is now spent supporting my sales team and working toward closing deals."

—Jason Nichol

Benefits for the Sales Manager

See the Entire Sales Pipeline

Digitizing and centralizing data from JDQuote2, customer profiles, and sales-rep notes has transformed Nichol's job. Nichol particularly appreciates how it allows him to filter for a location, region, or single rep with only a couple of clicks, so he can quickly assess specific pieces of the pipeline.

"It's easier to manage, more visual and more uniform," he adds. Color cues indicate the state of each deal, while progress bars depict the deal's lifespan. Managers see instantly recognizable feedback to identify bottlenecks or issues before they become bigger problems.

Benefits for the Business

Proactive Management

The Anvil VSP feature allowed PrairieCoast to flip from reactive managing to proactive managing. "It allows me to look at what's coming down the pipe, whether nine months away or six months away," says Nichol. "I like to make sure we are doing all we can to achieve targets and even stretch it to benchmarks, budgets and forecasting."

"It also keeps the sales team focused on their customers and follow-through, rather than interacting with the managers so much," he adds.

Nichol now views sales numbers by month or week to help the business maximize product orders and cash flow. "We're doing a better job of tracking our progress and anticipating how we're going to finish," he says.



VISUAL SALES PIPELINE

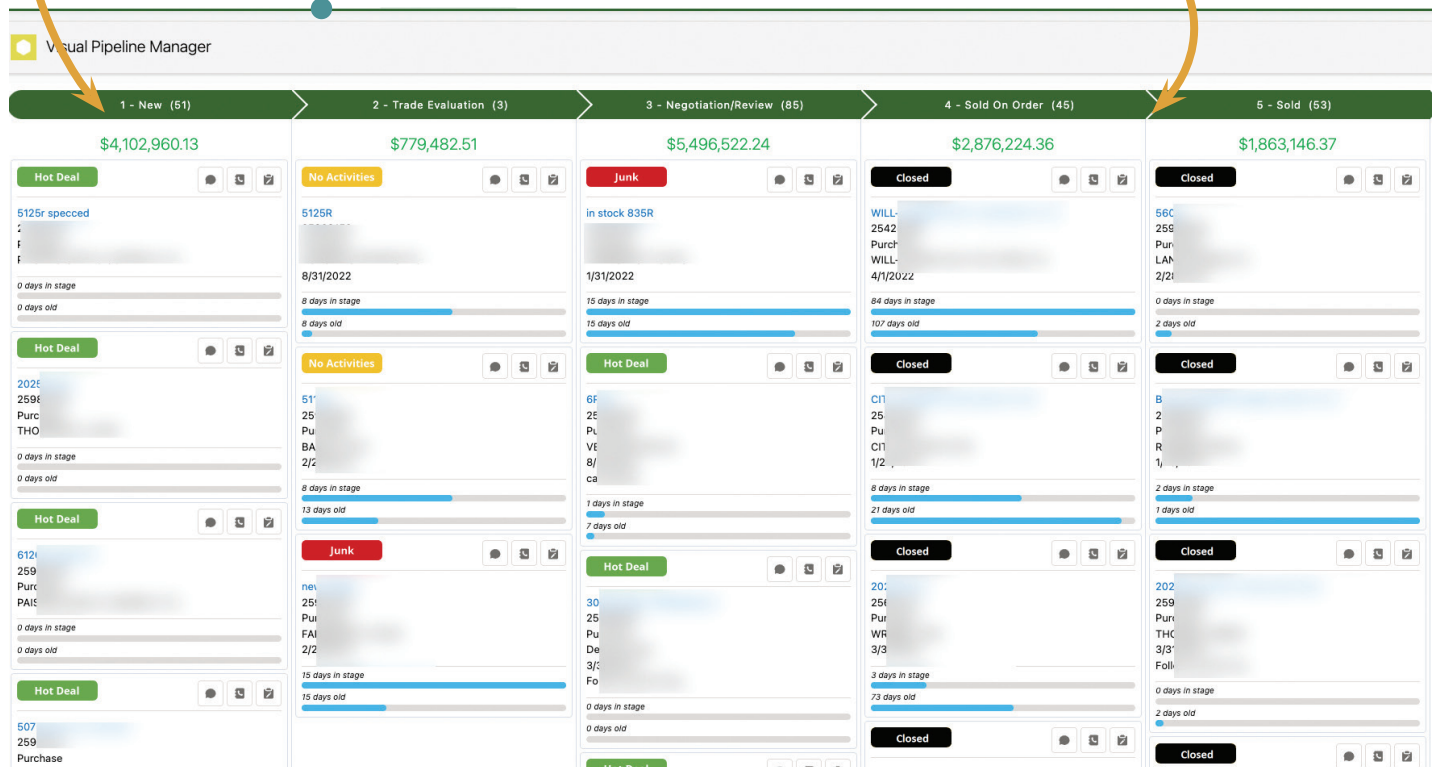
Organize your sales pipeline to view and manage the sales process quickly and easily.

Create a new deal in JDQuote2. A card is automatically generated and dropped into the Visual Sales Pipeline "new" column.

Quick-view summaries show how many dollars are in each stage, whether a deal is "hot or not," and how long a quote has remained in each stage.

Use the built-in filter to review deals for individuals or a whole team.

As the deal moves forward through the sales funnel, easily drag and drop the card to its next stage.



Screenshot of the Visual Sales Pipeline dashboard.

Learn more. Book a free demo.

sales@anvilappworks.com

763-273-4926 | www.anvilappworks.com