
REPORTING IN THE EQUIPMENT DISTRIBUTOR SPACE:

The Benefits of Equip-Soft CRM, an Industry-Specific Software Provider

“The bottom line is when companies work with Equip-Soft they get all the benefits of working with an industry-specific software provider, with the backing of the largest provider of business software in the world.”

Grant Skinner, Vice-President of Equip-Soft

Managing customer communications, workflows, and opportunities is critical to rental equipment dealers. The ability to quickly access account history and contact information is crucial. Managing relationships with customers by developing Salesforce Automation, Opportunity Management and Campaign Management is extremely important.

Rental and service equipment dealers must manage their operations through the complete management of short-term and long-term rentals, consolidated fleet management, instant availability of rentable equipment, easy setup of rental contracts and complete integration with fixed assets and service management such as warranties, incidental parts, and orders. Additionally, technology solutions for rental equipment dealers must provide easy handling of re-rents, exchanges, returns, and other transactional services.

■ DEALERS ARE COMPETITIVE

Managing customer relationships is critical for rental dealers because dealers are extremely competitive.

“There are a number of brands and dealers in the market so this notion of ‘it will take us three months to get a customer and a 30-second phone call to lose one’ is very real in their world,” says Grant Skinner, Vice President of Equip-Soft. “So they are pretty clinical about managing their customer relationships. They categorize their customers in terms of size so a customer that has 26 or more of their units is an ‘A’ customer for them because of the service contracts tied to those units and the incidental rentals tied to that business. That’s where they make all their money. It’s all profit. So if another dealer is allowed to encroach on their customers’ business and get some of their units or get in some rental contracts, it really does hurt them and it really does influence their business. So when we look at customer retention, we look at customer profitability.”

That’s where Equip-Soft’s CRM software, powered by Microsoft Dynamics, comes in because it takes that customer relationship to the next level. CRM gives you the applications and capabilities that will help you create and maintain a clear view of your customer interactions beginning with your first contact through purchase and post-sales. Microsoft Dynamics CRM gives you the tools necessary to improve your company’s marketing, sales, and customer service processes as well as improve your own business processes.

When it comes to selling new equipment, the fact is salespeople are extremely focused. Because the model dictates that the money is made in the service, salespeople have to

target new customers, and then they have to ensure that those customers don't buy anything from any other company.

"The CRM software is going to be able to capture the activity that the salespeople need including scheduling calls and setting up follow-up calls," Skinner says. "It will give the salesperson a good idea—with the dashboards, and access to information—of what is exactly happening on that side. If he sees a customer's rental business is dropping away, that could mean a number of things. That could mean somebody else is putting in rentals that he doesn't know about. It could mean that his organization is not performing well on the rentals. He wants to know those things. So from that perspective, the software is going to allow the salesperson to know what's going on with his customer."

■ THE MARKETING SIDE

On the marketing side, CRM enables your salespeople to penetrate new markets, generate new business as well as communicate effectively to existing customers. As a result, Dynamics CRM changes the game for your industry.

"For example a customer may have a particular type of facility that dictates he uses only electrical units. The biggest enemy in the electrical world is the fact that batteries don't perform, or the batteries aren't maintained properly," Skinner said. "So a dealer might have a particular solution for that. What he wants to do is ensure that he communicates information about battery products to these customers on a regular basis in order to keep the customers up and running for a higher percentage of the time."

■ CUSTOMER SERVICE

Microsoft Dynamics CRM software also handles customer service.

"It's important to have CRM on every single desktop in the business that's likely to have a customer interaction," Skinner says. "Say the customer phones in, and as small as the service item may be, you want the service desk and the software picking it up, you want to have visibility. Not only because you want direct and immediate action on the request, but you want to go back and see what's coming in through your telephones. The customer service component closes the loop on the cycle. We would suggest these components are where dealers are going to find the largest return on their investments on this software. CRM really does change the game in this component."

■ WHY EQUIP-SOFT?

Equip-Soft works with Equipment Dealers every day. Working with industry leaders such as PON North America and Mitsubishi Caterpillar Forklift America, we really understand the business challenges Equipment Dealers face.

We take the risk out the equation by eliminating the need for risky customization. We have built a scalable implementation process that allows large, mid-size and small companies to implement without taking an eye off the business.

Equip-Soft is a dealer management system focused on the unique needs of equipment dealers. By combining the dealer-specific enhancements that Equip-Soft provides to the Microsoft Dynamics stack of technologies, we are able to help increase dealers' operational efficiencies. After all, what good is business software if it doesn't help you improve your bottom line?

■ WHY EQUIP-SOFT CRM?

Whether implemented standalone, or integrated to Equip-Soft's full business system, our CRM software powered by Microsoft Dynamics helps you manage relationships with customers by developing your Sales Force Automation, Opportunity Management and Campaign Management.

With Equip-Soft, you can opt to deploy Microsoft Dynamics CRM for the management of customer communication, workflow, and opportunity management. Because the Microsoft Dynamics CRM software is fully integrated to Microsoft Outlook, your employees will be instantaneously familiar and at ease. They can access account history and contact information offline and contact information can be integrated to a mobile device automatically.

Opportunity Management is a great way to ensure your sales team is spending time with key customers, and that you have an accurate forecast. Managing the equipment life cycle through the rental fleet is key in ensuring the dealership receives the maximum financial benefit of every asset. Equip-Soft helps with automated workflows and easily customized views to access this information.

And Microsoft Dynamics CRM easily adapts, grows and scales right along with your rental business. It provides easy-to-use, familiar software that gives you the applications and tools you need to improve your sales processes and customer service effectiveness.

"The great thing about CRM is it fits into tools today," Skinner said. "It looks like an Office application. The interface is intuitive so the salesperson doesn't have to leave his Outlook screen to see what's happening in his CRM system. The fact is that a lot of this application is delivered through tools that he's already using today. For example, a salesperson can

tag an email quickly into a CRM account. The software is non-intrusive—it's not another piece he has to learn—both from a user perspective, and the way it gets delivered to him. It is deliverable everywhere. It's never far away. What we focus on when we train is how do we make that software valuable to the salesperson? How do we get him committed to using it? The fact is we're pretty sure he's going to use it because he's comfortable using other software from Microsoft. And CRM has the same look and feel as that other software.”

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equip-soft

Equip-Soft helps equipment distributors manage growth and improve efficiencies through its rentals, service, sales, parts, and fleet management software. We do this by matching up the best technology with the best business processes.

We work with today's leading equipment distributors to help them expand their product mix, or reach additional geographies through multi-site operations. We provide ways to improve how they work with their customers. All the while, we help improve their own efficiencies and relationships with their vendors. Equip-Soft does this through a fully integrated software product that helps manage business change in the equipment industry.

Equip-Soft has an edge that other equipment distributor software providers don't have. Our product is all Microsoft, there is nothing proprietary meaning that this will be the last software investment you will have to ever make. As technology adapts, we'll help you adapt along the way with new technologies. We have the highest degree of fit out of the box for your business. This means no customization, no risk, and easy upgrade. We speak your language. Your company will work with people that understand your challenges because they worked in the equipment industry before working with us.

For more information please visit <http://equip-soft.com>



Information on Microsoft Dynamics can be found at www.microsoft.com/dynamics