

Allied Automation

How SalesProcess360 helped a fast-growing distributor maximize their return on CRM with powerful action-oriented dashboards, account profiling and better pipeline management.

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Distributor Gains 360-Degree Visibility

Indianapolis-based Allied Automation is a distributor of technology-based manufacturing systems and industrial automation solutions. They sell products and services to businesses in Indiana, Kentucky, Illinois and Ohio around robotics, packaging, converting, assembly automation, process automation and more.

After hearing SalesProcess360 Founder Brian Gardner speak in 2016, Allied brought him in to examine where the distributor's strengths were and where their sales process could use some work. He provided recommendations on how to maximize the potential of their existing sales tools and suggested where they could invest to gain higher functionality.

Like many distributors, Allied was making critical business decisions using mainly sales data, essentially looking backward rather than forward – or “steering out the rearview window,” said Kevin Jordan, the distributor's operations manager who also serves as CRM's primary champion in the company. “We were making many of our strategic decisions about where to put our sales efforts based on where we had invoiced and what we had sold.” Looking backward also made it difficult to forecast cashflow.

Gardner's recommendations, based on his more than 25 years of experience in industrial sales management and CRM, hit a chord with the distributor's management, who within six months decided to switch CRM systems. They said their legacy CRM platform felt more like an add-on to their ERP and less like an integrated system designed for their industry.

They also prioritized reconfiguring and optimizing their sales process. SalesProcess360 worked closely with the distributor over a year to implement some critical changes.

Actionable, Process-Oriented Dashboards

Allied wanted to put numbers around the sales process leading up to the quote, starting with the lead. With its revamped approach to sales process and CRM, Allied was able to see every step of the sales process and how the company was trending on a daily, weekly, monthly and annual basis thanks to a set of dashboards Gardner designed for the team.

The dashboards made it easy to view and analyze data in multiple ways, including by individual rep, by geography, by vendor or by business unit, Jordan said, “moving the lens to bring these things together, looking at where the data intersects.” Some of the sales reps manage large sales territories – from a third to a half of a state – and customers are continually interacting with various touch points within the organization. The dashboards bring these touch points together.

The Allied team can now see not only leads and opportunities, but also the emails, phone calls and meetings associated with those customers. They can see whether those have converted to a quote and then a sale, and then view any applicable shipping and invoice data. They can see whether and when the orders were shipped. “The 360-degree view of the customer is a way to know your target that we didn't have

“Our meetings have become much more efficient and much more strategic.”

before,” Jordan said.

One of the biggest benefits of these dashboards is that it gives the company a way to bring new sales reps up to speed much more quickly when a salesperson with decades of experience leaves. “If those years of data are somewhat in the system – their purchase history, contact history, activity history, emails sent within the last few years, phone history, everything they’ve purchased from every manufacturer – that 360-degree view of the customer is invaluable to my sales force,” Jordan said.

And the 360-degree dashboards give management the ability to view trends early in the sales process so that they know when or if they need to change course.

Proactive Vendor Management

The dashboards that Gardner helped Allied build have also helped the distributor to strengthen their vendor relationships. The distributor can view activity across the entire sales cycle by manufacturer. They are sharing everything they’ve done across territories to grow sales with their brands.

“You put the responsibility on the vendor to back you up,” Jordan said. “The vendor relationship management that is an outgrowth of this strategy is huge. It’s changed the dynamic of our relationships. We have full transparency with four of our vendors right now, where I send them updates of everything we’ve quoted, and every open opportunity that we have.” The distributor is also tracking expenses by vendor, such as for lunch-and-learns, which helps Allied take fuller advantage of the vendor resources and co-op funds available to them.

4-Dimensional Account Profiling

As part of the distributor’s focus on becoming more proactive and strategic about their growth, they implemented Gardner’s proprietary 4-Dimensional Account Profiling method. The process has helped their sales reps focus on the highest-potential accounts for growth. The system assigns current dollar volume, potential dollar volume, current products/services purchased, and potential products/services to each targeted account. The accounts are graded on each, A to D. If an account’s current volume is ranked a D, but its potential volume is an A, that means it’s a high-growth target account (a DA). Based on this, Allied has been able to assign each sales rep between 15 and 20 target accounts.

This not only shows sales reps where to spend their time, but which product lines or services to target when they visit an account, Jordan said. “It’s incredibly powerful.”

Load Input

Sales goals are typically backward-looking, expressed as a percentage increase over the previous year. They generally start at the top and filter down to territory, product or service, and then ultimately to the salesperson. With Gardner’s help, Allied Automation developed a more proactive approach for their sales team by setting load input goals at the start of the sales cycle. Sales reps, who helped develop their own individual goals, now know what they need to do to reach their sales goals in the form of new leads and opportunities. Their progress is then shown via their dashboards to help them make decisions daily.

One sales rep realized that they couldn’t meet their load input goal for their high-cost, long-sales-cycle product line without shifting strategy, Jordan said. The sales rep shifted gears and rented out a space for an event to bring opportunities to the company rather than trying to meet prospects one-to-one. “He realized he had to consolidate his customers into one location to find enough opportunity to hit his goals,” Jordan said. “He was seeing this huge daunting goal and without being able to manage it with data, would have likely just said, ‘That’s unrealistic.’”

“It has changed the dynamics of our vendor relationships.”

Jordan said getting sales reps involved in the goal-calculation process made a big difference. “Because they did it themselves, and they see the math right there in black and white. They are agreeing to it,” Jordan said. “It’s not imposed, it’s organic. If goals are imposed, then they belong to somebody else exterior to the organization and they can agree or disagree with those goals. To get them to internalize the goal, they must have their hands on it. It has to come from them. They internalize their responsibility for it and take ownership of the success.”

From Reactive to Proactive

Working with Brian Gardner to revamp their sales process has made Allied Automation a much more proactive organization, Jordan said. “Our meetings have become much more strategic,” he said, “and much more efficient.” What’s more, meetings are focused on what needs to happen, vs. what has already happened. The company’s dashboards show the team where they have been and where they’re likely to go if trends continue. “This changes the conversation from: This is where we’ve had some wins, this is where we’ve had some losses. It becomes: This is where we have a lot of potential in the pipeline, and these are our most lucrative target areas for growth. What can we do to close these?”

About SalesProcess360

SalesProcess360 helps industrial sales organizations get ROI from CRM. We believe it’s about process, not just technology. We work with companies at all stages of CRM, from CRM selection to ongoing training long after implementation. We offer CRM audits, evaluations, implementation coaching and management training. We also offer coaching on sales process.

Services include:

- CRM Audit
- Sales Process Consulting and Coaching
- CRM Utilization
- Industrial Sales Management Peer Groups
- Sales Process Review and Mapping
- Speaking and Seminars



The founder of SalesProcess360, Brian Gardner, has spent more than 25 years in sales and sales management in the industrial market. He served as sales manager for a major regional rep/distribution company for 15 years before he founded Selltis, LLC, the only industrial-focused sales team CRM solution with roots deeply embedded in sales process improvement. Having guided Selltis to success, he has taken his passion for process improvement to the speaking and coaching world as the founder and lead evangelist at SalesProcess360. He is the author of *ROI from CRM: It’s About Sales Process, Not Just Technology*.

Brian was a faculty member at the 2016 University of Innovative Distribution in Indianapolis. He is also on the speaking circuit for many process control and industrial associations. He has also conducted seminars on the topic of sales and sales management at Texas A&M, Case Western Reserve University, and Louisiana State University, along with being a presenter at annual sales meetings for various companies.