

BRIGHTLIGHT

LED LIGHTING SOLUTIONS

BrightLight General Manager David Powley discusses how he was able to enhance his workforce productivity by using the powers of ACT! and QuoteWerks to manage the quote-to-sale process.



Introduction

Based in Auckland and Christchurch with a team of 10 staff, Bright Light is one of NZ's leading lighting wholesalers specialising in LED lighting solutions.

The business need

Having already implemented Sage ACT!, a customer relationship database, to centralise customer data and improve the way the business managed sales and marketing, General Manager David Powley next looked to improve the way his staff prepared quotes and managed the quote-to-sale process. "To create a quote my team would have to search for the products online or in a printed catalogue then manually type the item number, description, quantity and price into an Excel document; and when they sent the quote they had to remember to attach the relevant documentation", he explains.

This manual process sometimes resulted in discrepancies such as incorrect pricing and sending customers the wrong product. Quote retrieval was also time-consuming for administrative staff as hard copies were rarely filed in sequence and electronic copies were stored on the sales reps local drive.

David was looking for a system that would reduce the potential for human error and speed up the quoting process; it also had to integrate with their existing ACT! program so that sales staff could associate quotes with sales

opportunities. He soon found QuoteWerks – one of the leading quoting and proposal solutions available for ACT!

The solution

With QuoteWerks, David's team would be able to pull existing ACT! Contact data into a quote, schedule activities in ACT! from within QuoteWerks, and attach QuoteWerks quotes to ACT! Contacts and Sales Opportunities. QuoteWerks also offered the ability to handle product/service bundles, quote revisions, product images, file links and much more.

Initially David tried installing the QuoteWerks demo himself, although encountered difficulties during the installation process, so the project was put on hold. "Sorting out our quoting was still a priority for me, but I didn't want the hassle of installing such a complex product just to find out it wasn't right for us" says David.

It wasn't until almost 12 months later that David was prompted to revisit QuoteWerks following a marketing campaign from Xact Software. After speaking to the team at Xact it was decided that they would install QuoteWerks on the company's server - and he hasn't looked back since.

David states "Once QuoteWerks was installed and set up to work the way we wanted it to we found that it did everything we needed and it was so easy to use – it is great for us. But without the help from Xact Software, we couldn't have got it working."

The benefits

The team at Bright Light now use QuoteWerks every day and have generated over 1000 quotes to date. David estimates that the time spent creating, managing and filing a quote has reduced by 90%, and that data entry errors are almost non-existent.

There have been other unforeseen benefits too; David now has complete visibility of the business; he can track the performance of his remote staff and analyse his quote vs. sales ratio. He has also been receiving feedback from his customers about how professional his new invoices look. David explains

"The time and cost benefits we have seen mean that project has paid for itself within 12 months"

He adds "one of the main reasons why this implementation has been so successful is because I ensured that one of my staff was proficient with managing QuoteWerks – this means that if we want to make any changes to our products list, quoting templates or documentation we can do this in-house when it's needed".

Since implementing QuoteWerks David has also invested in the Xact Link for ACT! and MYOB. This product will further streamline the quote-to-sales process by enabling users to convert QuoteWerks quotes into MYOB invoices from within ACT!, without the need to manually re-enter the data.

