Home-improvement Company

Windows Tablet App to Support Sales Force

The Challenge

A nationwide home-improvement company boasting a sales force of over 1,200 had no technology in place to support its reps. Instead, the reps were relying on multiple product information binders, sales contracts, and hand-drawn sketches when calculating quotes and creating orders.

Knowing the environment was a drain on time and resources, the client was hoping for a mobile solution that could streamline the in-home process. The challenge was two-fold – the client needed an app that could remove guesswork and modernize in-home service but also be centrally managed to work within its IT environment and match in-house development skills. Looking for an experienced partner in the mobile enterprise that could manage the challenges, they came to Magenic.

The Solution

Magenic deployed a balanced team consisting of mobile, app dev, QA, and UX/UI resources to work with the client and their developers to actualize a Windows 8.1 RT app that operated on a fleet of Nokia Lumia 2520 tablets.

"[The app has] given the company a competitive advantage by working with leading edge technology in the customer's home."

Centrally managed in the cloud using Windows Intune, the app provides multiple points of functionality that have dramatically improved the process of conducting sales appointments. Sales reps are able to access directions to sales appointments using Bing Maps and accept proposed sales appointments from the tablet. They can then alert the customer of their arrival time.

Once in the customer's home, the sales rep can use the application to draw an electronic diagram of the rooms to be worked on. The room diagrams can be assembled into a floor plan allowing the sales rep to create a quote by assigning products and labor charges to the different rooms. The tablet app lets the sales rep to easily create multiple quotes of similar products at different price points.

The sales rep can use the tablet app to help negotiate a price with the customer by displaying multiple quotes at different price points. After the customer and the sales rep agree on a price, the customer signs a legally binding electronic contract directly on the tablet. The completed contract is uploaded to the company's back end systems. The order management group begins to fulfill the order, picking materials and assembling the order, (especially for next-day installation jobs,) while a PDF of the contract is automatically sent to the customer. (The contract PDF must be sent from the company's back end systems for legal reasons.)

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Results

Replacing paper catalogs with electronic catalogs has:

- Completely eliminated the cost of shipping updated catalogs to sales reps
- Reduced time to market for introducing new products
- Reduced pricing errors
- Granted real-time access to updated product information, thus reducing confusion and leading to better sales outcomes
- Allowed the sales rep to carry more samples into the customer's home

Replacing paper contracts with electronic contracts has:

- Completely eliminated the cost of faxing paper contracts or shipping updated contracts to sales reps
- Streamlined order fulfilment by reducing the lead time for the Order Management department to begin working on the order
- Improved contract accuracy by eliminating the sales rep's access to old contract versions
- Significantly reduced the cost of next-day delivery of contracts to customers (some customers still opt for paper)
- Given the company a competitive advantage by working with leading edge technology in the customer's home

Additional benefits include:

- Increased margins of on average 11% in regions as the tablets were rolled out to them
- More accurate diagrams have improved efficiency in the Order Management department by virtually eliminating the amount of time staff spends clarifying hand-drawn floor plans with the sales reps
- More accurate estimating has helped to reduce product waste during installation
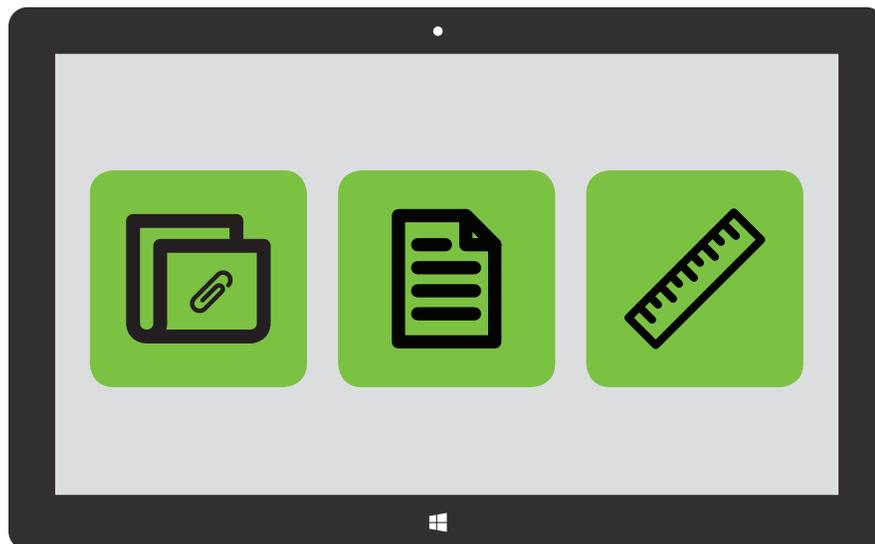
Instead of relying on multiple product information binders, sales contracts, and hand-drawn sketches to calculate quotes and create orders, Magenic worked with the client to develop an all-encompassing app that operated on a fleet of tablets.

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