



USER STORIES: FIELD SALES



“WE HAVE EASILY CUT FIVE TO TEN DAYS OFF OF EACH JOB BY USING FIELD2BASE.”

– Eduardo Lessa, CIO

- Wireless mobility
- Yellowpad stylus to text
- Simple Interface up & running
- Digital Camera worth 1000 words
- Annotation notes & ideas
- Forms Engine personalized
- Filing Cabinet CYA
- One Touch Send fire and forget

GEM PLUMBING

Field2Base Expedites the Sales Process

Ultimate Efficiency.

Gem Plumbing (www.gemplumbing.com), one of the largest plumbing and heating companies in the United States with sales of over \$35 million, was looking for a tool to make its residential HVAC division even more successful. Field2Base has proved to be the answer.

“We have easily cut five to ten days off of each job by using Field2Base,” says Eduardo Lessa, CIO of Gem Plumbing. “Our increased efficiency means we can service more clients and pitch more business, which translates into increased sales for Gem Plumbing.”

Gem Plumbing’s residential HVAC sales people used to have to go to a potential client’s home to discuss their needs, return to the office and then sit down with a project manager to explain the project. Next, the project manager would have to go to the potential client’s home to take necessary measurements etc., return to the office, compile a proposal and then sit down with the sales person to review the proposal. This was a lengthy process, which was extended further by the fact that Gem Plumbing’s sales people often have six to seven sales calls a day, which means they are typically in the office only once or twice a week.

Today, armed with a Field2Base tablet, Gem Plumbing’s residential HVAC sales people take additional steps to expedite the sales process during their first visit to a potential client’s home. They now take pictures of the rooms, make annotations on these pictures showing where vents and units will go as well as measurements and forward the information directly to a project manager at Gem Plumbing headquarters. By empowering its sales force to gather information that its project managers once had to, Gem Plumbing is saving its project managers from having to make a trip out to potential client’s home, while making it possible for them to immediately start compiling a proposal. This, in turn, greatly expedites the time it takes for Gem Plumbing’s residential HVAC project sales to be closed. In addition to using Field2Base to take photographs and make annotations, Gem Plumbing’s sales force uses it to make customer presentations.

“Our residential HVAC sales force is closing sales faster now that they are using Field2Base,” says Eduardo Lessa, CIO of Gem Plumbing. “It gives Gem Plumbing a very professional face.”

Soon Gem Plumbing will be using Field2Base to show members of its residential HVAC sales force the availability of the inventory needed to complete a project and the work crew schedule so that they will be able to tell customers on the spot when a project would be completed. This will mean an end to probable estimates and be another feather in Gem Plumbing’s customer service hat.

What’s your potential?

Ready to learn how Field2Base can help your business? Give us a call.