



# American Alarm and Communications Inc.



**Barry Chisholm:** Director of Sales

**Location:** Headquartered in Arlington, MA; 6 locations in New England

**Description:** Service-focused alarm company and security integrator.



## American Alarm Is a Great Place to Work. WeSuite Makes it Even Better.

With an impressive number of sales reps and technicians who have been with the company for over 25 years, American Alarm is doing something right! Barry Chisholm, Director of Sales, says, "We've been in business 50 years, and our very first employee is still on the job! We're family-owned, and employees are treated like family. Everyone feels valued."

However, he acknowledges that one of the challenges of working with such a veteran staff is that change is harder to implement. "Routines are so deeply engrained, and people get used to doing things a certain way," he says.

**"I was fully convinced that WeSuite could improve the way we handle our quoting and sales management, but my task was getting the sales team to embrace it. Being able to close sales more quickly, and more often, was just what they needed to see its value."**

### American Alarm Needed:



A sales management solution to tie together accounting, customer management and central station software



Tools to streamline and accelerate the quote-to-close process



Training and management of new sales reps



Quoting of state contracts

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***WeSuite is so robust and it can let us do many more things than the old sales software we'd been using for 20 years.***

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### Knocking Down Silos

“About two years ago, we left our previous sales platform and moved to WeSuite. One of the deciding factors was its ability to integrate with our other systems. We were using software called ISM that tied together accounting, central station, and our customer management and scheduling software. ISM allows us to look at a customer’s entire portfolio – see their recurring services, what equipment they have, any alarm events, anything they’re billed for. However, our sales software remained in its own silo.

WeSuite allowed us to integrate the remaining pieces, the quoting, proposal generation, and sales management workflows, to give us a unified, connected platform.

With WeSuite, everybody has visibility. We have 28 sales reps and 6 sales admin with licenses. If Mr. Jones calls in and his sales rep is out in the field, whoever answers the phone can help him. We can see what was quoted, make changes to it, and our sales admin can get the paperwork back to him for signature.

We started out with just WeEstimate, but we’re in the process of implementing WeOpportunity. It will allow us to keep better track of what’s in our pipeline. We’ll have actual reporting on close ratios and see what’s pending. It will also eliminate some redundant data entry because leads will pass automatically between ISM and WeOpportunity, and then when a sale closes, ISM will know to convert the lead to a customer.”

***“WeSuite is going to get us to **where we want to be financially.**”***

### Closing Faster and More Often

“When choosing new sales management software, we wanted something that would be easy for the sales reps to use – to access it from anywhere, create proposals, and get those proposals in front of customers as quickly as possible. Especially with our residential and small business customers, it’s a huge advantage to generate and sign documents on the spot, on a laptop or tablet, instead of heading back to the office and following up later with a bunch of paperwork. Before, our reps had to be physically in the office to connect to our network and get into the software. Now, the customer can say ‘Yeah, that all looks great, let’s go forward with it,’ and the contract can be signed then and there.

For us, the DocuSign integration within WeSuite was the feature that won over our greatest skeptics in the sales department. They’ve stopped printing out long contracts and driving over to the customer, or emailing them and then expecting the customer to print, sign, scan, and email them back. I would guess that we’ve increased our overall close ratio by as much as 20% since adding DocuSign as a feature. We had originally thought it would be used mostly for our residential sales, but our sales reps who handle larger, commercial opportunities appreciate it just as much.”

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***One rep who said he'd never use it now thinks it's the greatest thing since sliced bread. He absolutely loves it.***

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## Training Future Sales Leaders

"American Alarm is fortunate to have so many seasoned sales professionals, but in the next five years, six will probably retire. Rather than wait until they leave, I'm starting to build a bench of apprentices now. As I mentor the newer members of our sales team, WeSuite provides tools that help position them for success.

First of all, it makes it easy for them to pull together all the necessary elements for a quote and create a professional looking proposal. It's not a daunting process. Just as important, from a management perspective, the software lets me set different automated approval thresholds for apprentices, mid-level, and senior-level sales reps. I can keep tighter tabs on the apprentices while granting greater autonomy to those with more experience.

In the past, sales reps might rush out a quote to the customer without an approval and something was missed. Once the customer signed the contract, those mistakes could eat up our profit. With WeSuite, we now have controls in place that make sure all our jobs are profitable; we can monitor each quote's gross margin.

Also, as part of the automated approvals, for jobs above a pre-determined value, I have a chance to make sure a technician has walked the project and a second set of eyes are involved. With our apprentices, those thresholds that trigger a supervisory review are much lower. As the apprentices gain experience, I can change their status in the system and give them a bit more freedom; for sales under a certain amount and above a set margin, they can quote and close on-the-spot."

*"In terms of professionalism and what we're putting in front of the customer, **WeSuite has brought us to the next level.**"*

## State Contracts

"American Alarm actually started using WeSuite just for our state contracts over ten years ago. We were one of WeSuite's early clients. When we sell through state contracts, we're required to break down our quotes in a very specific manner. We have to separate material from labor costs, and labor rates for alarm technicians are set by the state, by region. The labor rate varies depending on the region in which a project is located. Our previous software wouldn't allow us to quote this way.

We worked with WeSuite to include our State Contract regional labor rates as part of our Massachusetts State Contract configuration. The software automates calculation of labor based upon the job site location, applying the correct contract regional labor rates as quotes are generated. We can also be very granular in how we associate labor with different parts. For example, when a rep selects a door contact, WeSuite pulls over an hour of labor at the correct regional rate. It's been very helpful in controlling our job costs and maintaining profit margins.

Now, all our sales happen through WeSuite, not just our state contracts. In the past two years, since our integration with ISM, we went from just a few reps using it in a limited capacity, to the entire team using it daily as a robust, connected sales platform."

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*"WeSuite worked really well for our state contracts, giving us confidence that it could improve all of our quoting."*

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## A Personal Touch

"As I mentioned at the beginning, American Alarm is family owned. Our Chairman, Dick Sampson, our President Wells Sampson, and our CFO Louis Sampson, set the tone here with an open-door policy. If we see something that needs to be addressed, or changed, or anything like that, we can bring it directly to their attention.

That's the beauty of working with WeSuite. They operate the same way. The support from the top down is outstanding. There are many other software companies out there, but they don't provide the same personal connection. I can get on the phone with them, describe what we need, and they'll go right to work coming up with a solution.

When I speak with people from companies similar to ours, I tell them 'Give WeSuite a good look!' For us, they've been a game-changer."

**WeSuite**   
Growing Sales Strong



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