WeSuite
Growing Sales Strong

Fire Monitoring of Canada Inc.
FMC and Bulldog Fire & Security

Chad Asselstine: V.P. of Business Development

Location: HQ in St. Catherines, ON, 13 Satellite Offices; Monitoring Services in 8 Provinces

Description: Large monitoring company and high-end security integrator

FMC FIRE MONITORING OF CANADA INC.

Successful Teamwork Begins with a Connected Sales Process

Fire Monitoring of Canada (FMC) is a trusted monitoring company and a high-end security integrator, with customers throughout Ontario and monitoring customers in neighboring provinces too. **WeSuite's connected, automated sales process and centralized platform has empowered the Company's sales staff to work more efficiently and collaboratively, propelling FMC's growth.**

FMC Needed:

Standardization of quoting process with ERP integration	Tighter pipeline management	Centralized platform for real-time collaboration	Professionally branded proposals

> *We needed a way to bring our sales staff together, to make our combined teams and our administrative process more efficient in several key areas*

Clear Priorities:

"In 2018, FMC acquired Bulldog Fire & Security, a systems integrator headquartered in Kitchener, Ontario. We needed a way to bring our sales staff together, to make our combined teams and our administrative process more efficient in several key areas.

Standardization was the first thing. We had an Excel-based quoting platform we were using, but as we've moved into the security integration space, we're dealing with many more parts and manufacturers. Our sales reps would find themselves searching for parts on distributor's websites and manually adding them to their spreadsheets. We wanted something that could pull parts and model numbers straight from our ERP system.

The next issue was our approval process. We wanted help with the overall quoting process, including a more professional-looking proposal and quicker calculations, but from a management perspective, the bigger question was "How do we get out ahead of any potential errors? Any potential mistakes?" So, the automated approval process in WeSuite was a big selling feature for us.

And lastly, our pipelines were getting out of whack. We were using HubSpot for our CRM, which required a lot of double data entry by our sales staff. The more you ask salespeople to do something repetitive like that, the less likely they are going to do it. We needed something that integrated the process, from lead through sale, to get accurate reporting.

For these reasons, FMC began looking at quoting software and, during that search, we came across WeSuite. I started my conversations with them in November 2018, signed off on the package in January 2019, and began the implementation process."

"Using both WeOpporutnity and WeEstimate gives us a seamless process from lead-entry all the way through closing a sale."

Choosing WeSuite

"A major factor for why we chose Wesuite is that it is industry-specific. That's what drew us in, although it hadn't been our original intention. We assumed that we'd be working with a large software developer or CRM provider, and we'd have to customize things and "make do."

But we stumbled across WeSuite and saw that it caters to customers in the security space and it integrates with our ERP platform, so I did some research on their website and began a conversation with them. One of the big things is that FMC quotes are based on margin, not on markup. When we started to explain this to WeSuite, they completely understood our approach; it was clear that we were on the same page.

We originally purchased 16 licenses; I think we have a few more than that now.

We recently added QuoteAnywhere to our package. We purchased it primarily so that our technicians would be able to handle a quick quote and sign-off with customers right on-site, but we now realize that it also has value for our sales reps too. When they're out in the field, it lets them hit up a Starbucks and put together a quick quote from there."

> **"**
> *A major factor for why we chose WeSuite is that it is industry-specific. They understand what we're dealing with, and talk the same language."*
> **"**

ERP Integration

WeSuite offers interoperability with our ERP solution; that's huge for us. We wanted to keep the hands of our sales reps out of our ERP. WeSuite has done that. Our full catalog of parts and pricing is always available, in real-time, through the WeSuite interface.

Everything that we quote is done through WeSuite. It starts with WeOpportunity and then goes to WeEstimate. We mandate that everything starts in WeOpportunity for tracking purposes. All of our quotes come from WeEstimate, and then, after they're won, the quote details are automatically pushed to our ERP software from WeSuite, as a new job for installation and management from there. So, really, it does everything for us from a quoting perspective.

When a rep is building a quote and has a question or needs assistance, we can log into WeSuite and look at it together. There's no more emailing of Excel spreadsheets back and forth."

"Everyone benefits from having a real-time environment where we can work together and make changes together."

A Better Approval Process

"Prior to WeSuite, we had approval processes in place, but when you're not maintaining them through the use of software, there are loopholes. We've eliminated loopholes through the use of WeSuite's automation.

We started with all quotes requiring pre-approval, but that's not the case anymore. For example, we have some sales reps with a lot of seniority and experience; for them, we loosen the restraints and apply different exception rules. Now, some reps don't require an approval unless a job is over $25,000 or under a certain margin.

With other, more junior reps, we require approvals of any jobs over $2,500.

We also now have more people handling those approvals than when we first started up with WeSuite. I was primarily responsible for approvals in the past; now there are five of us,

including some system engineers. We can change approval exceptions for reps as they continue to grow, but if they have a few sales that don't make the grade, we have the ability to tighten things back up again.

We realize that our sales reps want to do the right thing, but it's human nature to sometimes take advantage of loopholes when they exist. Tightening up our approval process with WeSuite has helped profitability. I can't formally quantify it because I haven't done the calculations, but I believe we saw a return on investment within one calendar year"

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> *"Tightening up our approval process with WeSuite has helped profitability. Plus, **WeSuite is able to accommodate our always-evolving processes.**"*
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Pipeline Management

For starters, because WeSuite is connected to all of our other platforms, we're only asking sales reps to enter data into the system a single time. It's an automated pipeline, so once we enter a lead, it's there. When a sales rep changes a lead's status or the percentage probability that a job will close, it's all reflected in the pipeline. And then, when they go to create a quote and send it to the customer, all of the data is current and in one place. Most of the time, my sales reps don't even realize that they're updating the pipeline. It just happens. From a management standpoint, it alleviates much of the frustration of trying to keep tabs on an accurate pipeline.

Then, because we have accurate information, reporting is much more meaningful. Every month, I provide our VP of Finance with an updated funnel. He can see what's been sold, what's sitting in negotiation – meaning it's been sent to the customer, versus what's in progress – projects we're actively quoting but haven't yet presented to the customer. We can also see what's sitting in our leads. We have a strong sense of the entire sales picture.

We use this reporting regularly for our internal finance auditing and for tracking our sales reps. We have a friendly challenge within the group and give prizes on a quarterly and annual basis to sales reps who have come closest to or exceeded their quota. WeSuite makes all this reporting easily accessible."

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Selling Better and Closing More Often

"For us, WeSuite allows us to see just how much, which customers, which verticals we've done the most business with during that year and allows us to integrate the efforts of our marketing team and sales team. From a realized and quoting margin perspective, it allows us to see how accurate our sales staff are in their system design. We look to have no more nor less than a 5% slip on margin. And, WeEstimate allows us to put our sales staff in the best position to achieve that, as well, because we do have eyes on it from some of us who are a little more experienced. It allows us to work as a team in that quoting process.

It also eases the labor-intensive process of proposal generation, while helping our sales staff to make a more professional presentation.

Every one of our proposals is generated automatically by WeSuite. It lets us maintain consistent branding and design at a corporate level, while allowing each rep to customize certain elements to match their presentation

style. Everyone has their unique preferences – like how to show pricing, whether products have extended descriptions, and whether folders have headers. Also, some proposals are branded as FMC, while others carry the Bulldog Fire & Security identity of our subsidiary.

Reps have some latitude as to what they include. For example, if they're dealing with a long-term customer, a proposal doesn't need the About Us page, the Services section, that sort of thing. They can shorten it up.

Our customers have often shown us the quote they received from a competitor, and it's just a list of items without model numbers or a very brief, vague description. Comparing the two is like apples to oranges. Ours makes a much more professional statement.

Our sales reps can also turn around revision requests very quickly. Since the quote has been built in WeSuite, they just make the adjustments within the software and drop the revisions into the proposal. All calculations are automated."

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WeSuite Empowers Employees from Wherever They Work

"WeSuite is helpful during onboarding because I'm able to put new hires through WeSuite Academy, and it gives them another voice showing them how to quote, how to calculate margins, and what-not. It allows us to show them that there are similar values between what WeSuite is teaching from an expert sales perspective and what we teach and believe.

Our team has been working remotely, but given that we're in fire safety, not much changed for us in terms of how busy we are. Our sales staff definitely had to change their approach, since they couldn't visit customers in person. There were many more Zoom calls, and our sales team had to garner as much information as they could without being on-site. They did a great job, and we've continued to work quite well.

Nothing really changed for us much, from a WeSuite perspective, because we don't necessarily all go into the office and work together as it is. So, it was kind of status quo for us, in that sense. WeSuite allowed us to do that. I can imagine how companies that didn't have a system like WeSuite in place would have had a much harder time.

"WeSuite allows us to work together, improve the team aspect of our sales, and collectively bring sales and operations together."

Why Should Others Invest in WeSuite?

"You have to take a look at what you're currently doing and where you want to get to. Waiting to see if you can do without it, that's an ROI decision. How much are you paying multiple people to do what this software could do?

Going with WeSuite has allowed us to work with a company that's within the industry, understands what we're dealing with, and talks the same language. There's a linear approach from prospecting all the way through to billing of a job that closed all the loops for us.
I say to everyone, "Create your own roadmap. How do you want to see your prospect through billing work?"

WeSuite gets us there; it solves those issues for us. It allows us to work together, improve the team aspect of our sales, and collectively bring sales and operations together. As the folks at WeSuite like to say, it gives us a "connected sales process." And, as I mentioned earlier, it quickly pays for itself.

I should also mention how much I enjoy being part of the WeSuite community, attending their annual conference and webinars. Customers get to know all the faces within WeSuite. They're not just someone you talk to over the phone or on the computer. We also get to know other customers and help each other. I enjoy that. WeSuite's not a giant software company; at least it doesn't feel that way. When you reach out, you know that support will get back to you that day, in some way or another. That's definitely of value. We know they're there for us.
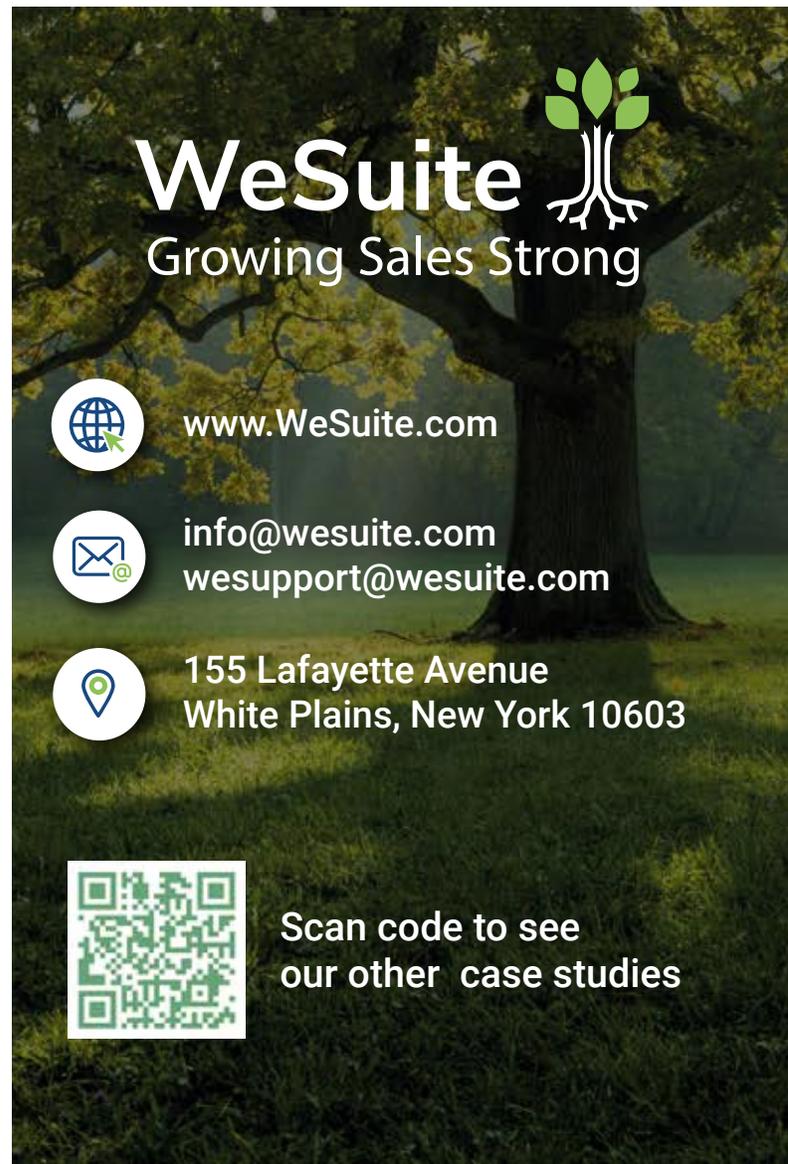
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