Results Offers Visibility to Future Performance

Case Study: The Molding Depot

CUSTOMER
The Molding Depot

INDUSTRY
Millwork Construction

FOUNDED
2000

KEY CRM NEED
Needed to manage sales opportunities and quotes in a system that would integrate with QuickBooks.

RESULTS PRODUCT
CRM Business Suite

ABOUT THE MOLDING DEPOT
The Molding Depot specializes in high quality molding, windows, entry doors, interior doors, door hardware, and all types of architectural and custom woodwork. The company not only sells their products, but often provides project management and installation services. Their client base is large and diverse as they service commercial and residential customers in their local Florida area as well as customers from across the US.

BUSINESS CHALLENGES

Managing Quotes & Sales Opportunities. Each day, The Molding Depot receives customer inquiries and issues several job quotes. They needed a way to track all leads, quote activity, sales opportunities and potential revenues.

Documentation for Jobs. Most issued quotes have associated technical specifications and CAD drawings. They needed to keep the documentation together while providing each team member access to the files.

Clean QuickBooks Data. Since the company was using QuickBooks as a CRM and estimating software, their QuickBooks data had extra leads and prospects records. They wanted a way to streamline data entered into their accounting software.

WHY RESULTS?

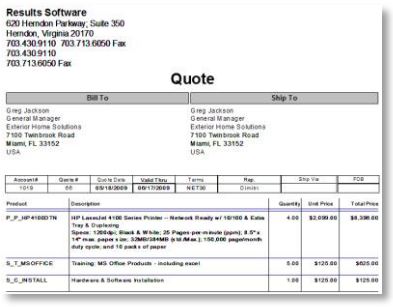
Quote, Sale and Lead Visibility. With Results, the Management and Sales Teams have visibility to all quotes and potential leads. The automatic processes feature in Results allows the company to easily and consistently follow up on leads.

Document Management. Results became the central repository for all technical documentation; quote and project activity. All team members can access the project details without having to retrieve any physical paper files.

QuickBooks Integration. With Results CRM, only sales and customers are transferred into QuickBooks. This process keeps the QuickBooks application focused on financial transactions and provides the sales force a prospects management tool.

FAVORITE RESULTS FEATURE

The Molding Depot uses Results to create and manage their Sales Opportunities and Quotes. All associated documents can easily be stored under the appropriate Sales Opportunity. Since Quotes can be easily transferred into Invoices, they can quickly integrate their Invoices with QuickBooks data.



Results Software
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703.430.9110 703.713.6050 Fax
703.430.9110
703.713.6050 Fax

Quote

Bill To	Ship To
Greg Jackson General Manager Exterior Home Solutions 7100 Twinbrook Road Miami, FL 33152 USA	Greg Jackson General Manager Exterior Home Solutions 7100 Twinbrook Road Miami, FL 33152 USA

Account #	Quote #	Quote Date	Valid Thru	Terms	Rep	Ship Via	FOB
1019	66	05/18/2009	06/17/2009	NET30	Dimitri		

Product	Description	Quantity	Unit Price	Total Price
P_IP_HP4100DTN	HP LaserJet 4100 Series Printer -- Network Ready w/ 10/100 & Extra Tray & Duplexing Specs: 1200dpi, Black & White; 25 Pages per minute (ppm); 8.5" x 14" max. paper size; 32MB/384MB (std./Max.); 150,000 pages/month duty cycle; and 10 packs of paper	4.00	$2,099.00	$8,396.00
S_T_MSOFFICE	Training: MS Office Products - including excel	5.00	$125.00	$625.00
S_C_INSTALL	Hardware & Software Installation	1.00	$125.00	$125.00

"Results gives our sales force a tool for lead and contact management. Managing our sales in Results provides motivation and visibility to the future performance of the company."

President
The Molding Depot