

Materials Mover Drives Cohesive Sales & Marketing with Help from Technology Advisors

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Company Profile

Papé is a 75-year-old American company that rents and sells heavy equipment and trucks for moving materials. Papé exists as the Papé Group of Companies, which includes Papé Machinery, Papé Material Handling, Papé Kenworth, Ditch Witch Northwest, and Engineered Products. With multiple locations across the United States, Papé is a leading supplier of heavy equipment, agricultural and forestry equipment, material handling equipment, and other capital equipment needs.

Company Stats:

- Industry: Heavy Equipment, Trucks, Moving Materials
- 4th Generation family-owned business
- Founded 1938
- 90 Locations
- 2,700 employees

Business Situation

Originally using a combination of CRM and spreadsheets, Papé's system existed as a set of multiple databases, preventing teams from establishing a cohesive customer view. The databases did not share the same physical account record for a given customer or a contact record for a single person at each account. The Papé team quickly realized the fragmented data was returning inaccurate information on the equipment each account was using. Clear communication between divisions was extremely difficult, as no one division could capture the entire picture of a customer.

Meanwhile, the Sales and Marketing departments struggled with their own difficulties. Sales reps had no consistent way to execute, track, and store quotes. Marketing found it nearly impossible to consolidate and qualify leads; and, with no clear path for distributing and tracking the leads assigned to sales reps, they were left in the dark. Because contacts were duplicated across multiple databases, Marketing also struggled to track which contacts received which marketing materials. Were they sending some people the same assets twice? Some not at all?

Solution

After listening to Papé's frustrations with its disconnected database, Technology Advisors recommended a series of changes, starting with the conversion to a single CRM/database to consolidate and merge accounts and contacts. Technology Advisors' CRM experts recognized that gaining full transparency among departments meant discarding the outdated CRM and spreadsheets system and starting fresh. So, the implementation team set up Papé with a more stable system while Technology Advisors' technical experts configured features to do the following:

1. Provide industry-mandated security for certain account types
2. Provide full functionality for the Marketing department, including lead qualification, tracking, allocation, and distribution of marketing materials
3. Provide daily dashboards to enforce adherence to company-specific goals
4. Provide route mapping for Sales rep productivity

Technology Advisors also implemented integration with Papé's backend financial systems to build a singular view of all the company's customers. Technology Advisors chose the StarfishETL platform to perform the multi-faceted, dynamic CRM-ERP integration that was needed.

Benefits

Today, Papé can easily track and store its data for marketing, upselling, renewals, equipment maintenance, and end-of-life tracking. The Sales and Financial departments can access the same data using the integration between the CRM and financial system, minimizing duplicate data and providing a cohesive reference point for all parties.

Dashboards gives Sales reps a view of their daily workloads at a glance. Reps can even map routes to their sales calls to improve efficiency and make more of their tight schedules.

Reports show upper management the progress the Sales reps are making towards their goals, as well as provide historical insights for better analysis and more accurate forecasting. Marketing and Services have a clear view of sales progression and customer satisfaction and are able to deliver better experiences.