



Holmes Security Systems



Drew Stevens: Commercial Sales Representative

Location: Fayetteville and Wilmington, North Carolina

Description: A regional leader in life safety and security sales. It operates the only U.L listed 5-Diamond Central Monitoring Station in Southeastern North Carolina.



QuoteAnywhere Helps This Commercial Sales Rep Do Just That!

Drew Stevens has been selling commercial and residential security solutions for Holmes Security Systems since 2017. He's one of four salespeople working out of the company's Wilmington office; the other four are based in Fayetteville.

"We're a family-owned business and have been around for a long time. We do everything in-house and take pride in our customer service. Everybody can talk about products, but at the end of the day, the customer service experience is what keeps people on board, especially the way products are constantly changing," he says.

Within the past two years, the company transitioned to using WeSuite.

Hunter Security needed:



A mobile sales platform to manage projects seamlessly from contact to contract.



Faster turn-around of quotes and professionally branded proposals.



Salespeople spending more time selling and less time dealing with paperwork.

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We're full throttle with it now. I use WeOpportunity and QuoteAnywhere throughout my workday. It makes my job much more efficient because I can do everything on the move.

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Learning the System

"When management introduced WeSuite to us, I was one of those who jumped right in. That wasn't the case with everyone. Like at any company, we have some folks who are creatures of habit and don't like change. They wanted to keep using paper contracts. But once they got over the hump of learning a new process, they found that it's a way easier way to sell.

We all use iPads, and learning how to use the system is really not that complicated. It's just a matter of repetition. The more you use it, the more efficient you get, and it quickly becomes second nature. I would describe it as pretty easy to use.

A Complete Solution

"Because our company gets such high ratings and benefits from so many customer referrals, we get a ton of inbound leads. Depending on how a lead comes in, sometimes our admin staff will put it into WeOpportunity; in other cases, we on the sales team will do it ourselves. WeOpportunity is where everything starts, and we build out the basic customer and project details there.

Then, when I'm ready to actually build a quote, all the data is already in QuoteAnywhere. I don't have to reenter anything. I can create an estimate and package, assign the documents that are necessary, and send the proposal through to the customer using DocuSign. And then, I'll change the job status to won, lost, or pending. That all happens in QuoteAnywhere.

Before we had WeSuite, I would have to run back to the office between every job to get it submitted, schedule the job, and scan contracts. Now I can do everything on the road, on the weekends or at night. It allows me to perform my entire job from wherever I'm at, which is a major bonus.

Fast, Easier, and More Accurate Quoting

Using QuoteAnywhere is a huge time saver. We have a lot of pre-built packages in there, and we're adding more all the time. The packages really simplify quoting.

The prices within the quoting tool are current because WeSuite integrates with our Sedona accounting platform. I don't have to spend a lot of time cross-checking everything against our pricing sheets like I used to.

Our hourly rates are in QuoteAnywhere, too. When I build a quote, the labor number auto-populates based on the parts or services I'm quoting. Then, I can make changes if I need more time or delete the fractional labor attached to a material item and bundle all the labor together as one number.

Slam Dunk Proposals

Although my title is Commercial Sales Representative, I'm actually in a hybrid role selling residential, small business, and commercial, so I

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need the flexibility to create proposals that are right for each customer. When it's time to generate a proposal, I can select what I want to include through QuoteAnywhere. Some projects don't need our company's complete mission statement or back story, which I can attach, but it's a nice addition for others. Everything looks very professional.

Providing an electronic document for the customer to review and sign delivers it in a way that makes people more likely to look it over. Especially if the customer is closing on a business or house, a printed proposal from me is just another stack of papers they have to deal with. They may not take time to look through it. When it's electronic, they don't have to remember where they put it; if they lose track of it, I can just resend it.

Plus, in situations where I can get a signature while onsite, QuoteAnywhere lets me strike while the iron's hot. I can close and schedule the job on the spot. Of course, this mostly applies to residential customers. Commercial jobs usually aren't a sign-on-site type deal. QuoteAnywhere accommodates both types of sales.

More Time Selling

WeSuite saves me at least 10 hours per week. That's two hours each day on drive time and unnecessary visits to the office. Instead, I get out in front of a lot more people. I can make more touches and meet with prospects and customers more quickly.

If you sell enough of something, over and over, you get pretty quick at it. **But QuoteAnywhere has definitely made the entire sales process a whole lot faster!**



WeSuite
Growing Sales Strong



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