

# Swish Cleans Up Sales With TeamSFA and Intel®

## Case Study

Dual-Core Intel® Xeon® and Intel® Centrino® processor technology

Swish Maintenance Limited

With TeamSFA's seamless solution powered by Intel®, the Swish head office is now connected with the mobile sales team and they are seeing productivity increase by 20 percent.



**Challenge** Increase productivity of sales team across Canada and in the Northeastern US.

**Solution** Dual-Core Intel® Xeon® and Intel® Centrino® processor technology

### Summary

After years of growth, Swish wanted to help its sales force clean up with customers. They turned to TeamSFA to enhance sales teams' mobility and automate manual processes, and TeamSFA stocked up on Intel to power its network.

### Challenge

Founded in 1956 in Peterborough, Ontario, Swish Maintenance Limited\* has been expanding across Canada and into the Northeastern US, distributing products such as cleaning chemicals, machinery and paper from major vendors.

Ken Lynch, Vice President of Sales at Swish, was looking for a way to improve the productivity of his sales teams and reduce time spent on administration. He also saw an opportunity to re-allocate staff to higher value responsibilities that would generate more sales.

"We wanted to eliminate time waste, but also manage our growth," says Lynch. "Our reps were spending three hours a week on administration and managers were spending another hour. That's time we could be spending on sales."

For Lynch and other senior managers, the ability to get accurate and timely reports was an issue as he had to send an email to a rep for an update and wait for a reply.



"I knew we couldn't handle this manual process and continue to grow," says Lynch. "I needed to be able to know what is going on in Maine or Halifax or wherever without waiting for a reply from the field. I wanted to go online and instantly see what that person did yesterday, today or what they have planned for next week."

Michael Flynn, co-founder and CTO of TeamSFA\*, saw an opportunity to use the Internet to leverage the effectiveness of Windows\* mobile devices for mobile sales teams. While some other market solutions allowed mobile workers to see customer data, they weren't fully integrated into corporate network applications.

"Sales and service people are the largest users of the mobile framework so I saw a need to improve connectivity between existing enterprise software and these road warriors," says Flynn, noting that the tie between enterprise systems and Windows CE devices was critical to making it a useful tool.

## Solution

TeamSFA's solution seamlessly connects a corporate head office's ERP system to a mobile device in the field through bridge software created and hosted by TeamSFA that updates data in real time. As a hosted solution, TeamSFA needed to make sure its software was hosted on a robust platform that could easily scale to meet the needs of its growing customer base. They placed Intel® at the core.

At the heart of their server farm is Dual-Core Intel® Xeon® processor technology, which TeamSFA chose for its scalability and available processing power to handle peak demands. Using name brand technology such as Intel eases integration with all corporate software and hardware. "I have yet to find a non-Intel processor that runs the environment I work in as well as Intel does," says Flynn. "There is a real advantage to using Intel. I prefer them for their inherent high level of compatibility."

To allow for redundancy and fail-over capabilities, TeamSFA has two collocation facilities. The combination allows back ups in the event of disaster recovery, but also allows the company to scale up quickly to handle the growing number of transactions and activities of their clients.

"We have our software running on four different servers at one time. As customers log on, they are routed to the least busy server and can be moved over to a different server without interrupting a customer session," explains Flynn.

**"Our priority is response time, and with dual core processors, I get the best combination of reliability and scalability which is critical when you're running software as a service business."**

*- Michael Flynn, co-founder and CTO of TeamSFA.*

Additionally, since TeamSFA is paying for space at its collocation facility, getting more power in smaller, thinner servers makes the business more profitable. "The smaller the amount of space used by more powerful servers, the more profitable I can be because my overhead is reduced by the physical space," says Flynn, adding multiple cores within each machine increases responsiveness and scalability. "In the past we could only handle one set of instructions at a time. With multi-cores, I have ability to run multiple instructions at the same time," he explains.

At Swish\*, IT Manager Dennis Favro oversees the implementation and support of all technology, including the TeamSFA installation. The company has Pointforce Enterprise\* by TECSYS\*, an ERP software controlling base operations including enterprise performance management, distribution management, warehouse management, transportation management, and e-commerce. That ERP system is powered by servers featuring Intel Xeon processor technology.

In the field, Swish has armed its sales force with handheld mobile devices that allow them to easily connect to office email and enter customer data. All this information is instantly processed and updated into the ERP databases through TeamSFA's servers with Intel Xeon processor technology.

The choice of Intel internally at Swish was easy. "Personally, I would select Intel's server offerings for my own use because the complete product line is an excellent value, regardless of the tier in question," says Favro. "I use them at Swish and I can't see why someone wouldn't use the Xeon line."

In the field, Swish has standardized Eten Glofiish\* M700 featuring Intel XScale® Technology for all sales teams, allowing instant and easy processing of information through Team SFA's servers powered by Dual-Core Intel Xeon processor technology.

## Key Advantages

Flynn says that while there are other web applications for sales force automation, few of them work on handhelds and even fewer are fully integrated into ERP systems. Tight integration into corporate databases allows TeamSFA to keep sales information, customer data and marketing information up to date and eliminates duplication of data.

The solution was also acknowledged in the industry with a Silver Award for best mid market solution by the Channel Elite Awards\*, which honours partners that have created the most innovative and problem solving hardware, networking, online or software-based solution.

## Automation Cuts Waste & Increases Sales

For Swish, the advantages have been better communication with the field and enhanced planning which has translated into more sales.



"The more time we can spend in the field doing our job, the more sales we'll make," says Lynch. In the past, reps would spend up to three hours a week in the office doing administration and e-mail.

**"The general feeling of the reps out there is we've cut administration time down from three hours a week to nothing. Reps have more time in the field and that means they can make more calls and earn more commission."**

The bottom line for Swish has been crystal clear. According to Lynch, sales have been increasing and commissions earned by reps have increased an average of 19 percent.

"We projected what we hoped we could see from an increased productivity standpoint," says Lynch, explaining they hoped to eliminate three hours a week of administration time which works out to 15 percent of an employee's available work day. Lynch says they've seen productivity increase closer to 20 percent.

Lynch no longer needs to wait for a reply from the field about sales targets or budgets. He can log on as often as needed and get real-time information that improves decision-making and planning.

"When booking meetings, reps shouldn't have to think about what they need to cover. It is all right there on their handhelds," says Flynn, adding at budget time making projections on sales for specific vendors was challenging. Swish can also now easily pull customer and vendor specific data to fine tune sales targets over the course of a year.

"It's been awesome as far as I am concerned," notes Lynch.

### **On The Road & In Touch**

Mobility is important for staff of both Swish and TeamSFA. In addition to using handhelds at Swish, Lynch relies on his Toshiba\* notebook computer with Intel® Centrino® processor technology to keep in touch and up to date while traveling to regional offices or client sites.

TeamSFA's staff have notebooks, including Toshiba\* desktop replacement notebooks with Intel® Centrino® or Intel® Core™2 Duo processor technology.

"The trend is moving away from desktops to notebooks with large screens," says Flynn, noting visible real estate is critical when doing development work. "We need wide screen displays but also mobility so we can take our notebooks to a customer site, make software code changes and upload it instantly.

**"Since we are working on a web-based application, we can be anywhere in the world, make a change to the software, upload it to the servers and customers can start using the new version instantly."**

Lynch adds that since the system is accessible from any web browser, Swish sales people can return from calls and enter data from their notebook or home office computer. "I can access the network from virtually anywhere," says Lynch, noting "everyone has hotspots."

### **Better Communication & Tracking**

Since customer service and sales reps all access the same customer details, nothing is ever lost from past meetings. This also helps new reps as they can access all the customer history, and arrive at

meetings prepared and professional with a good understanding of not only what sales have been made but where Swish would like to take the business.

In the past, customer data was stored on handwritten cards. When a long standing rep left the company, they would lose the history.

"Like most companies, we have been very shallow with the information we have to turnover to a new rep if someone leaves or is promoted. Now everything is right there in the database. It's 100 per cent transferable," says Lynch

At the administrative level, customer service or telemarketing staff can schedule calls for clients in a rep's calendar. As needed, they can include a vendor's training staff into the same appointment.

"Next time the rep logs in, he sees that he has an appointment, but also what the customer wants to know more about and what information to bring with them."

Additionally, the software has been customized to allow field reps to instantly quote on products based on customer-specific pricing, or for large orders, the details are e-mailed to a quotation manager who can reply quickly to a client request. All this information is instantly updated on the internal servers powered by Intel Xeon processor technology.

At the executive level, this visibility allows Lynch and the team to see in real time what calls are made and the ensuing results.

## Removing Paper & Improving Marketing

Swish has been able to move away from having reps carry bulky catalogues because they can send marketing material electronically to clients, and in the event of a price change, data is instantly updated.

"Having catalogues sitting in the trunk of a car or a filing cabinet is not useful," says Lynch. "By sending it electronically, the customer can decide if they need something printed or if they want to store it electronically."

For more information on

Dual-Core Intel® Xeon® processors, visit [www.intel.com/go/xeon](http://www.intel.com/go/xeon)

Intel® Centrino® processor technology, visit [www.intel.com/products/centrino](http://www.intel.com/products/centrino)

Since all the data is entered right from a client's office and into a centralized database, it reduces errors, and all the information is updated in real time.

"Lynch says the depth of customer information and product detail has improved the quality of marketing materials by being more targeted to customer needs. Out of date mailing lists are a thing of the past.

## Future Uses

Swish sees opportunities to provide vendors access to the TeamSFA system so that each vendor can see accurately by client which products are being used, and what plans Swish has to market new products. They will also be able to tap into a sales rep calendar and schedule meetings or trainings that dovetail with upcoming sales plans.

"There's been tremendous interest at the vendor level," says Lynch. "By integrating our sales rep time with vendor rep time, we can be even more efficient and serve customers better. Our vendors will see when we have meetings scheduled and be available for training if needed or they can schedule calls for key clients that we are building and have everyone able to see what the other is doing."

For TeamSFA, plans are underway to further expand the use of their software for more industries beyond their current focus on agricultural businesses, distributors and large manufacturing firms. Flynn says they are also trying to expand their integration to cover all ERP and accounting systems by creating software bridges that will allow more businesses to download the version they need to connect seamlessly into their ERP or accounting system.

"There is a need today for tight integration of mobile workers and the corporate enterprise data," says Flynn. "While there is still a lot of customization required, we are getting the installation times down from months to hours."

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