

Clayton Controls Drives Revenue Growth With CRM for Epicor Prophet 21

Since 1967, Clayton Controls has delivered comprehensive automation systems to a diverse range of customers, operating as both a distributor and a manufacturer with engineering services.



**AUTOMATION &
FLUID INDUSTRY**



**SET THE
FOUNDATION FOR
COLLABORATION**



**STRENGTHENED
RELATIONSHIPS WITH
VENDORS**



**SIGNIFICANTLY
IMPROVED SALES
PERFORMANCE**

Clayton Controls

INDUSTRY

Automation & Fluid Power

LOCATION

California, Nevada, and Arizona

ABOUT

Clayton Controls operates as both a distributor and a manufacturer to serve a wide range of customers who use automation systems.

Longtime company owner John Allard, an Army veteran with over 30 years of leadership experience and a passion for technology, recognized the lack of integration between the company's ERP and CRM systems was a major hurdle limiting the company's growth. By implementing a CRM for Epicor Prophet 21 and designed for distribution, the company set the foundation for collaboration and new opportunities.

Learn more about how Clayton Controls has improved sales performance, expanded vendor relationships, and maximized their investment with the right CRM and business intelligence solution.

A CRM Integrated With Epicor Prophet 21 Set the Foundation for Success

Clayton Controls initially used Maximizer CRM, which allowed them to move away from spreadsheets, but lacked any visibility into quotes, contact information, order history, or any other data that existed in their ERP, Epicor Prophet 21.

Allard considered Salesforce but ultimately chose White Cup because he didn't want to have to rely on a custom integration to make a generic CRM work for the distribution business model.

“I know things change, software gets updated, and those links get broken, the person who did your customization may not be around anymore. So having a standardized package was a lot more attractive in that regard. I knew the product was really geared toward our industry.”



John Allard
Owner
Clayton Controls

Improving Sales Performance and Customer Service

The Clayton Controls leadership team has taken a unique approach to driving CRM adoption by incentivizing the sales team with KPIs tied to CRM activity that correlate to an additional percentage commission bump. In some cases, it can be a significant quarter-end perk.

In addition to incentivizing CRM usage, Allard and his sales managers also review customer interactions recorded in White Cup CRM and use them as coaching opportunities.

Using a CRM that integrates natively with Epicor P21 has also made sales forecasting much easier.

The team can easily see their sales performance last year and what sales opportunities they have in the pipeline, then develop a more accurate forecast from there.

When a quote closes in P21, the team can view it in CRM so they can see the full history of the interaction with the customer.

The value of implementing a CRM spans beyond Clayton Controls' sales team. They've implemented user-defined fields in CRM to help the manufacturing side of the business better prepare for influxes in demand as well.

“We set up a UDF to track the potential value of target accounts,” Allard said. “Our sales team keeps these targets updated, so when I get the call from the factory about projections, it’s quick and easy. We have total traceability on everything we’ve done to convert that target to a customer.”

Applications engineers can even use the CRM to enter details about projects, including adding any call notes or recordings from the customer for clarity. This helps the whole team manage projects more efficiently and bill more accurately.

“There are so many facets to winning or losing deals, but when the CRM is used to its full potential, it sets the sales reps up for more at-bats. The more at-bats, the more hits.”



John Allard
Owner
Clayton Controls



Expanding Vendor Relationships With a CRM and BI

Because of the complexity of projects Clayton Controls supports, a single opportunity and corresponding quotes could involve products from numerous vendors, including those specializing in robotics, conveyors, and hydraulics. A deep integration between the company’s CRM and ERP allows sales reps to create quotes that include exactly the products and SKUs in their inventory, according to P21.

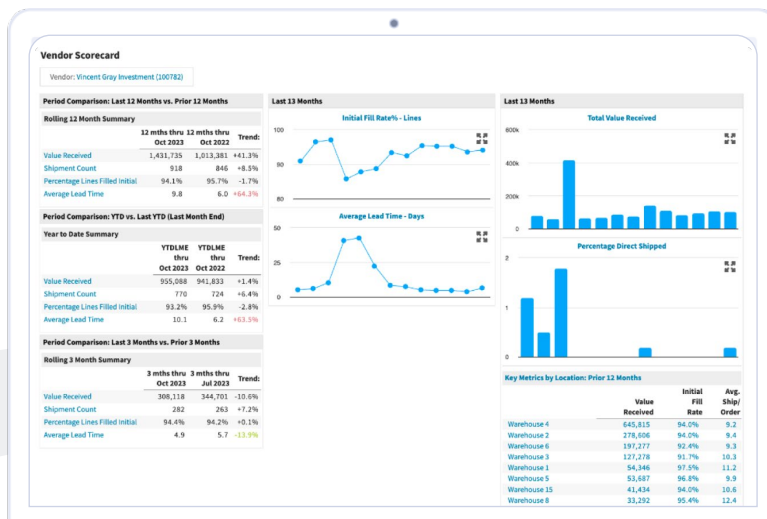
This helps the team more accurately forecast demand. They can easily filter data by vendor and by product to help their manufacturers plan ahead as well.

Being able to show this level of detail has been pivotal in convincing large vendors to sell more products through Clayton Controls because they can more easily measure the return on their investment.

“Back in the day, as long as you had the sales numbers, you were great, now I need to have a lot more leading indicators to show the vendor. When I can show them activities, projects, and where they are in the sales funnel, I can show them I’ve got engagement here.”



John Allard
Owner
Clayton Controls



Maximizing the Investment in Epicor Prophet 21

As the company adds new product lines and reaches new geographic areas, Allard plans to expand and improve upon reporting so he can show how every team member's efforts impact sales.

He wants to be able to show vendors how many leads the Clayton Controls team is generating and what percentage convert into opportunities and closed deals so he can build greater trust and expand future opportunities.

“It’s a two-way communication between us and our vendors...so when it comes to getting the ROI on the marketing dollars we’re all spending, you have a much clearer picture of that.”



John Allard

Owner
Clayton Controls

KEY RESULTS

- **Set the foundation** for collaboration with a CRM for distributors
- **Significantly improved sales performance** using a CRM
- **Strengthened relationships with vendors** with better business intelligence and reporting
- **Maximized the company’s investment** in Epicor P21 ERP

**Start Making
Data-Driven
Decisions**

Unlock the information buried in your business systems with powerful reporting and analytics from White Cup BI.