Sherpa CRM for Office Technology

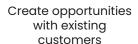## Managing customer relationships is easier with Sherpa CRM

SHERPA CRM

The office technology space has no shortage of challenges. From an ever-more digital workplace, to narrowing margins and consolidation of competition, the list goes on. The key to surviving and thriving in the current is landscape is to make the most of your team's time and technology to solidify customer relationships.

With more than 20 years of office technology expertise, Sherpa CRM from White Cup is the industry standard that's been powering customer relationships and driving sales through turbulent times, including the modern challenges facing our businesses.

Our comprehensive software manages quoting, ordering and the sales cycle in an efficient and easy-to-use system that integrates seamlessly with your existing ERP.

Create opportunities with existing customers	Integrate with your existing business systems	Improve sales process and shorten sales cycles	Choose between cloud or on-premise platform options	Quote quickly with the industry-specific proposal creation module

Drive revenue with Sherpa CRM

Grow revenue: Gain visibility of the sales process, exposing both sales opportunities and losses.

Increase profitability: Easily spot opportunities to shorten the sales cycle and move customers to newer solutions.

Deliver excellence: The 360-degree view of customer buying trends and history allows for more meaningful, customized sales conversations, providing exceptional customer service.

Team Benefits: Save time and money with office technology-focused, pre-made dashboards and scorecards instead of customized spreadsheets.

White Cup by the numbers:

20+ Years in the office technology industry

50+ Technology integrations

200+ Built-in, ready-to-use reports and dashboards

Product features:

Comprehensive 360-Degree View of Accounts shows service history report, billing and usage history, lease management and other relevant information on one account screen.

Easy access to TCO (total cost of ownership) reporting to determine the most profitable product configurations by customer. TCO reporting includes:

- MPS (managed print services) analysis
- Competitive machine tracking
- DCA (data collection agent)

Mobile App for Apple and Android smartphones provides full functionality of the TDF CRM along with talk-to-text note taking and turn-by-turn driving directions for easy use on the road.

DocuSign integration for easy electronic signature.

ViewPoint/telemarketing scripts to aid with cold calling.

Extensive Outlook integration including a built-in TDF toolbar that allows for tasks and other TDF activities to be created in Outlook. The bi-directional synching eliminates the need to toggle between Outlook and TDF.

Sales funnel management customization provides real-time snapshots of open opportunities. Data is organized for easy slicing and dicing of specific reporting views.

Built-in reports for forecast and sales reporting. Create activity and forecast reports for management.

Import customer data from your ERP to quickly view billing, usage and service history report to spot problems and opportunities.

Automated document workflows to keep proposal generation, order submission, processing and closing sales paperwork organized and moving forward.

Intelligent device mapping to show current and future machine placement options.

> Two years ago I realized that with our sales team constantly changing, I needed a smarter way of staying in touch with our clients. After reaching out to a few of my colleagues across the country who already used Sherpa CRM, I quickly realized it was my best path moving forward.

John Winkler,
Partner, INS Inc.

Uncovering actionable insights is easier with analytics you trust.

Say hello to White Cup BI, the Business Intelligence tool companion to Sherpa CRM that shines an even brighter light on opportunities to increase revenue by capitalizing on sales trends, improving the sales process, and creating satisfied customers.

To learn more, contact your sales rep or visit **whitecupsolutions.com**

About White Cup

White Cup offers revenue intelligence solutions specifically designed for the office technology industry. Our software connects data across critical business systems, reveals industry-specific analysis, and provides the tools needed to take action for revenue improvement. With decades of industry experience, White Cup is trusted by more than 1,000 customers globally.

WHITE CUP