WHITE CUP

ELEVATE YOUR SALES GAME

THE ULTIMATE CRM SOFTWARE PLAYBOOK for Distributors

Customer relationship management (CRM) software is essential in today's distribution sales landscape.

At a time when customers have more access to information than ever before, as well as the ability to buy from anywhere, having a responsive, consultative sales team can be your greatest competitive advantage. That's only possible if your entire customer-facing team — not just outside sales, but inside sales, marketing, operations, and customer support — has clear insights into your best opportunities at the account and contact levels, as well as the tools to act on them.

As distributors adapt to changing dynamics, CRM software has evolved to become much more than a tool for logging activity and tracking sales performance. A robust, user-friendly CRM platform enables businesses to document and analyze interactions across both digital and traditional channels, offering valuable insights for strategic decision-making and customer engagement. This approach empowers sales teams to be more efficient and focused, aligning their efforts with customer expectations and emerging market trends.

In this resource, we'll discuss the key benefits of CRM software, the most important factors distributors should consider when evaluating solutions, how to improve user adoption, and how to maximize the impact of your CRM with battle-tested sales workflows.

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Benefits of CRM Software

When CRM software works well, it has significant impact across your organization and a ripple effect that extends to your customers and vendors.

Here are just a few key benefits:

Enhancing customer loyalty

CRM software offers comprehensive customer scorecards, tracking individual customer interactions, preferences, and transaction history. This allows businesses to anticipate customer needs more effectively, leading to enhanced customer satisfaction and retention.

Closing deals faster

Automated workflows in CRM systems streamline the sales process. These systems can follow up with prospects, send reminders for pending actions, and manage communications, significantly reducing the time taken to close deals and improving overall sales efficiency.

Fostering a culture of collaboration

CRM tools facilitate the sharing and analysis of customer data across departments. This collaboration enables more effective marketing campaigns, targeted lead generation, and improved customer support, all driven by shared insights and data.

Improving relationships with vendors or suppliers

When paired with a comprehensive business intelligence solution, CRM software provides valuable insights into product performance and customer preferences.

This information can be leveraged to improve interactions with vendors and suppliers, ensuring better product availability and more effective supply chain management.

A Forrester Research study found **CRMs boosted team productivity by 35% and increased customer retention by more than 25%** on average.

Boosting profit margins

By analyzing sales data and customer feedback, CRM systems help optimize product offerings and pricing strategies. This leads to more targeted sales efforts, increased efficiency, and stronger profit margins.

Enhanced sales performance management

CRM systems include tools for monitoring and managing sales performance, such as scorecards and KPI tracking. This helps in setting clear goals for sales teams, tracking progress, and identifying areas for improvement.

Identifying new business opportunities

With access to business intelligence, CRM systems analyze historical data, inventory trends and customer online behaviors. This analysis helps target potential new markets, refine product offerings, and tailor marketing strategies to take advantage of emerging opportunities.

More accurate sales forecasting

CRM software offers real-time data analysis, providing a clear view of the sales pipeline. Leading solutions are also using AI and historical data to facilitate more accurate sales forecasting, helping businesses plan more effectively and adapt quickly to market changes.

These benefits contribute to an **efficient, customer-centric, data-driven business environment,** empowering organizations to stay competitive and responsive in a dynamic market landscape.

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How ERP, CRM, & Business Intelligence **Work Together**

Sales & Marketing Automation

Customer Support

Quotes & Deal Management

Contact & Lead Management

Sales pipelines

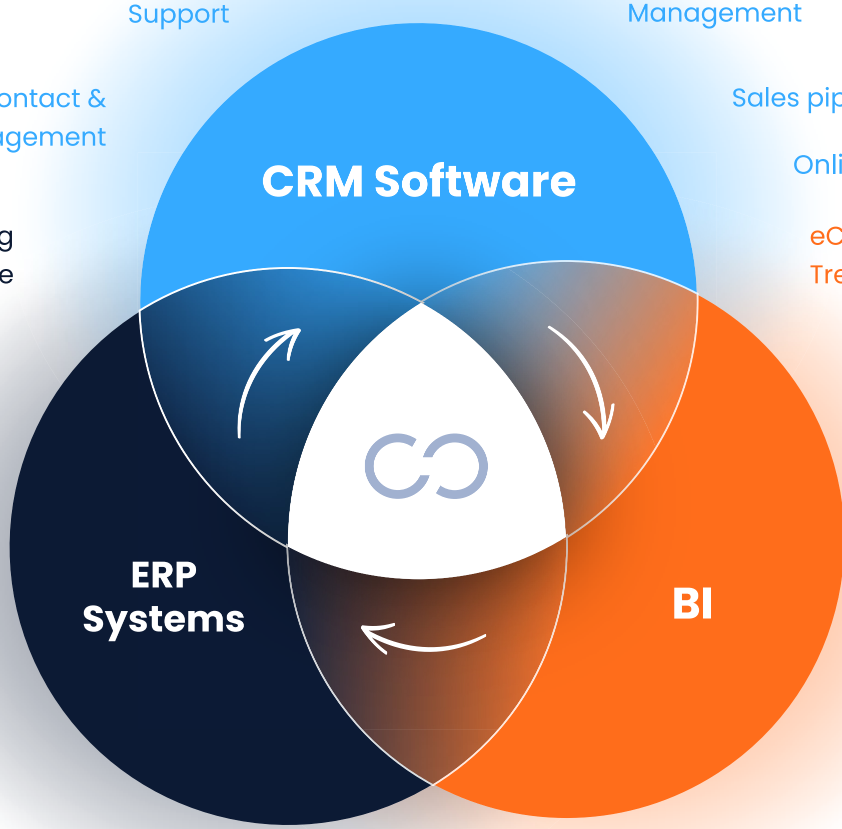
Online sales data

Accounting & Finance

eCommerce Trends

Production and Manufacturing Management

Total Sales by Account & Sales Rep



Inventory Management

Top Customers

Order Processing and Fulfillment

Time to Fulfill Orders

Compliance & Regulatory Reporting

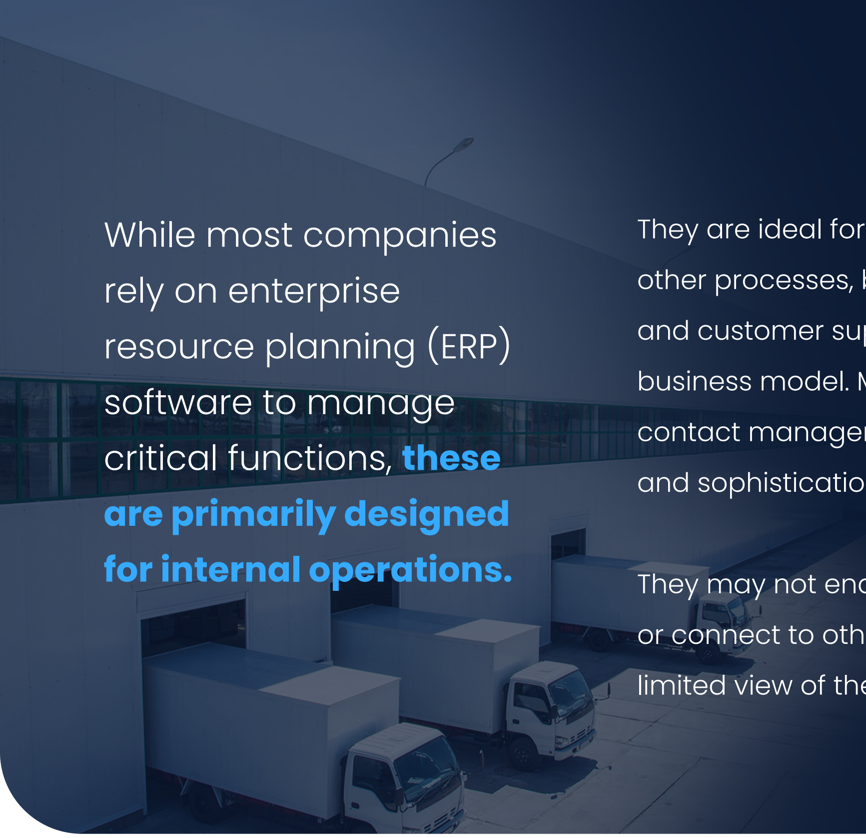
Pricing History & Profit Margins

Purchasing

Supply Chain Management

YoY Sales Performance

Product Trends



While most companies rely on enterprise resource planning (ERP) software to manage critical functions, **these are primarily designed for internal operations.**

They are ideal for managing finance, HR, inventory, purchasing and other processes, but they aren't built to support sales, marketing and customer support — especially in a complex distribution business model. Many ERP systems include basic CRM functions like contact management and email services, but they lack the depth and sophistication of dedicated CRM solutions.

They may not enable remote access for a sales team on the road or connect to other departments, leaving your company with a limited view of the customer journey.

Most ERP softwares are also not designed to be business intelligence solutions.

While ERP systems gather a wealth of data, most distributors need additional BI tools to consolidate information into reports and actionable insights. They may even need to hire a data analyst or a consultant to prepare a report each time they need to analyze product trends, evaluate pricing, or forecast sales for the upcoming quarter.

In a sales landscape marked by growing consolidation of distribution giants and increasingly competitive pricing, **the integration between an ERP, CRM, and business intelligence is critical.**

Modern CRM solutions equipped with BI capabilities enable distributors to forecast product and category demand more accurately. This precise forecasting is crucial for effective communication and collaboration with suppliers. It allows distributors to set realistic expectations and helps suppliers understand anticipated demand patterns.

Without a deeply integrated CRM and BI solution, distributors risk basing their forecasts on outdated or incomplete data, such as the previous year's sales figures. This approach fails to account for variables such as the shifting nature of customer demand or any active deals in the pipeline.

An integrated system ensures that forecasting is not only based on historical data but also incorporates real-time insights from ongoing customer interactions and market trends.

Why Distributors Need **a CRM Built for Them**

The unfortunate reality is that as mission-critical as a CRM is for distributors, research from consulting groups over the past two decades shows between **30–70% of all CRM implementations fail.**

There are many factors contributing to CRM failures, but some of the most common culprits are higher than expected costs, low user adoption, and lack of integration with existing systems. In an industry where ERP systems are central to business operations, the importance of integration can't be overstated.

CRM software has evolved considerably beyond ERP add-on tools, but most modern solutions are designed to meet the needs of a range of industries. They weren't designed for distribution sales, and they don't integrate with ERP systems without extensive customization.

This makes them extremely expensive and time-consuming to implement — a cost most companies don't anticipate until it's too late. In addition to the upfront costs, which can be tens of thousands of dollars, these custom integrations can add months to the original implementation timeline.

Distributors also need to invest time into training their teams to use solutions that can be overly complex, navigating through many features and functions they don't need.

They'll spend considerable time building workflows that work for their business model, which all adds to the time it takes to see the return on their investment in the software.

The frustration of using a solution that wasn't built for them may be enough to push sales reps back to old familiar tools and bad habits.

Traditional CRM software often has limitations on the number of users who can access it, so companies restrict it to their outside sales team.

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Evaluating CRM Software

With the impact of CRM software extending across your organization and affecting both sales and long-term business growth, it's a choice that deserves **careful consideration.**

Ease of use

No CRM software provider claims to have a frustrating user experience, but it's only later that your team discovers any challenges. That's why it's essential to have the right people involved in demos from the beginning. Ask the right questions. **For instance:**

- Does the software offer **role-based functionality?**
- **What insights** will each user see when they log in?
- How many clicks does it take to find **essential customer details?**
- Does the system make it easy to see each person's **most critical tasks** for the day?
- How well does it work on **mobile?**

Features

Does it have all the features your organization needs?

Here are some of the most important elements to consider:

- **Access** for your whole team
- **eSignatures** for quotes
- **API availability** to synchronize data with other systems
- **Business intelligence** in ready-made reports and dashboards
- **Native eCommerce** integration
- **Calendar** integration
- **Contact & lead** management
- **Marketing automation** & campaign tracking
- **Customer service** ticketing
- **Mobile app** oriented
- **Quoting & order** management
- **Pricing optimization** *(or the ability to integrate with a pricing solution)*
- **Sales performance** management
- **Workflow** automation

Scalability

Is it an on-premise or cloud-based solution?

While many CRMs started as server-based solutions, cloud-based, software-as-a-service (SaaS) models have become the preferred choice for most modern businesses. They are easy for team members to access anywhere, and the costs are typically part of a monthly or annual subscription, rather than requiring a significant upfront investment in IT hardware and support. With cloud-based solutions, companies can easily add new users or receive software upgrades.

How easy is it to add users or new functionality as your company grows?

Companies see the best return on their investment in CRM software when their entire customer-facing team uses it. Having to pay additional costs for each individual user limits the potential to use it across your growing organization.

What is the company's product roadmap? How often do they release updates and new features?

The pace of advancements in technology has never been faster. Today's software providers frequently update their solutions to incorporate automation, machine learning, artificial intelligence, and native integrations with new solutions as they emerge. It's important to gauge a provider's ability to stay relevant so you can stay competitive.

Total cost of ownership

When considering the adoption of CRM software, it's crucial to look beyond the subscription price and understand the total cost of ownership (TCO). **Here's how these costs break down:**

Licensing costs

Many CRM platforms use tiered licensing models, offering basic versions with limited features and user slots. This can restrict access to outside sales reps and leave out essential team members like accounting, customer service, and marketing personnel, all of whom are vital for comprehensive customer relationship management. As a business grows, it may need to upgrade licenses to include more users and features, increasing costs.

Implementation time and costs

Traditional CRM software often requires significant time and expertise to set up and customize. This may involve hiring consultants or specialists, leading to substantial implementation costs. Additionally, ongoing customizations to workflows or templates, integrations with eCommerce, an ERP, or eSignature tool, to name just a few, and training can further add to the expenses, impacting the bottom line.

Data storage costs

The costs associated with data storage in traditional CRM systems can escalate as the customer base and data volume grow. Businesses with extensive customer data, especially those in expansion phases, may face higher than anticipated storage costs.

Maintenance and upgrade costs

The shift towards cloud-based solutions is reducing the IT-related costs of on-premise CRM systems. However, it's important to note that not all SaaS CRM solutions provide free upgrades. Companies may still incur costs for accessing the latest software versions, contrary to the expectations set by many SaaS models.

Support costs

Support services aren't always included in CRM subscription fees. It's important to clarify what level of support is covered to avoid unexpected costs that are often overlooked when budgeting for CRM software.

Costs of additional solutions

Some CRM solutions do not include features like business intelligence, marketing campaigns and automation, eSignature capabilities, or customer support ticketing functionality. This means investing in additional software solutions and providing training in those add-ons.

Understanding the full spectrum of costs associated with CRM software is essential for making an informed decision. This includes not only the subscription fees but also the expenses related to licensing, implementation, data storage, maintenance, support, and any additional solutions required to meet the business's needs.

Return on investment & time to value

Understanding the costs is just one part of the equation. As you make the business case for CRM software to your executive team, you also need to provide a realistic estimate of expected returns.

Here are a few questions to consider:

What will you save by eliminating software subscriptions you no longer need?

Some companies use a combination of other software solutions for business intelligence, email marketing solutions like Mailchimp, eSignature solutions like DocuSign, or customer support solutions like Zendesk. *(White Cup eliminates the need for all these by combining these capabilities into a single solution.)*

How much time does your company spend creating custom reports?

Do you need to involve the IT department each time your sales team needs to get pricing or product reports from your ERP system? (This is not uncommon for distributors who either don't have a CRM or don't have one that integrates with their ERP system.)

Do you need to hire a consultant each time you need a pricing analysis?

White Cup, for example, eliminates these needs by equipping all customer-facing team members with access to hundreds of prebuilt dashboards and reports tailor made for distributors.

How much time are your sales and marketing teams spending on manual tasks you can automate?

Think of the time you spend not just compiling reports, but writing emails to prospects, following up on the status of open quotes, reminding customers of ongoing promotions and offers, or creating reminders for people to re-engage leads.

White Cup automates these processes to keep your team focused and deals moving forward.

What opportunities are you missing with existing customers?

Think of the customers you've lost in the past year. While some churn may be inevitable, it's possible to reduce some of it with better visibility into at-risk accounts — for instance, a customer who hasn't placed an order in several months.

What new opportunities are you missing?

If you sell products on your website, you're likely also missing opportunities to connect with customers browsing your website and adding products to their cart without making a purchase. With better visibility into their online activity, your sales reps can follow up to capture revenue that would otherwise be lost.

They can also have more productive offline conversations with a better understanding of your customers' priorities based on the products they purchased or added to their cart online.

How quickly can we start using the CRM?

When your company is implementing new technology and processes, timing is everything. You don't want any delays to affect your team's ability to execute. Assess the level of support and training the provider offers during and after implementation.

Ask questions, including:

What templates are available for your team to use?

Will they help you set up workflows?

What integrations will you need that aren't included?

What will the first week, month, and quarter look like with your new solution?

What ongoing resources are available to help you maximize your investment, such as webinars and tutorials?

SUCCESS STORY

Callico Distributors moves from reactive reporting to data-driven decision making with White Cup CRM+BI

Callico Distributors is a family-owned, third-generation wholesale distribution company providing janitorial, food service, office supply and packaging supplies to resellers throughout New England. With a large number of products and significant warehouse space, Callico helps other distributors serve an array of customers without high shipping and storage costs.

Before implementing White Cup CRM and BI, the company had to hire data analysts to produce meaningful reports from its ERP system, which was expensive and time-consuming.

Since implementing White Cup BI, the company has increased profitability using data to make more strategic, growth-driven decisions. It also uses White Cup CRM to set smarter sales forecasts, improve customer engagement and monitor sales performance.

"We didn't have any insight into purchasing behavior, and we couldn't report on accounts receivable or accounts payable. **We didn't have any executive reports. We were just blind in a lot of ways."**

Cole Callahan
Director of Strategic Initiatives
Callico Distributors, Inc

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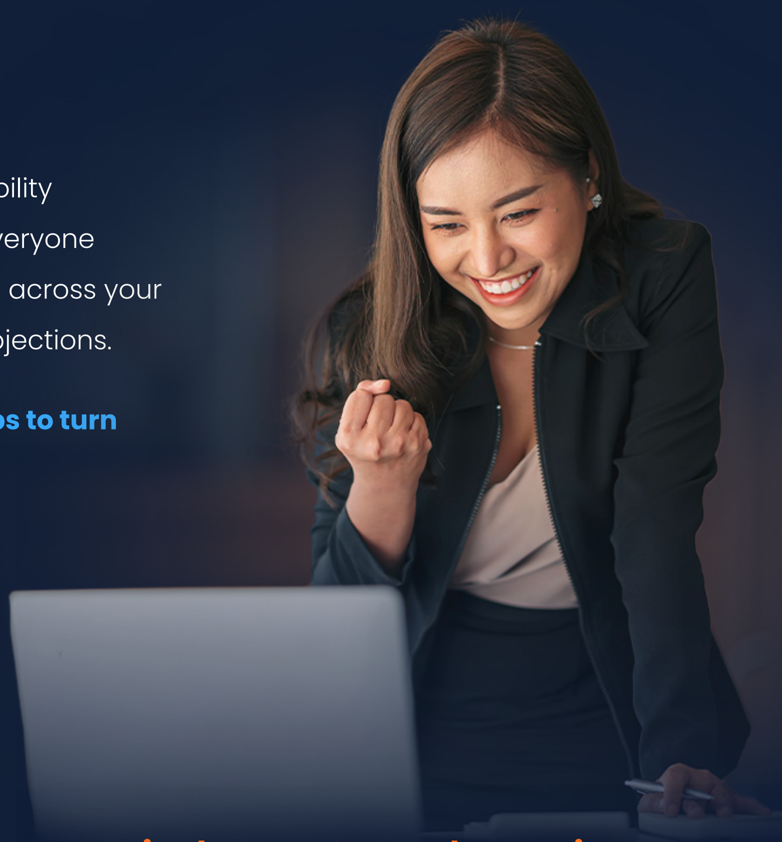
How To **Increase CRM Adoption**

A CRM benefits your entire organization by improving visibility into opportunities and streamlining processes. Helping everyone understand what's in it for them and involving key people across your company in the decision will help them overcome any objections.

Once you've chosen the right one, follow these quick tips to turn CRM skeptics into power users.



Show them the impact on performance

Educate your team on how a CRM will make everyone better at their jobs, helping your company hit its targets, improving marketing, enabling better customer support, and more.

For instance, when your sales team can see critical information about customers without compiling or requesting reports, they can be more prepared for meetings while focusing on what they do best.

(And your IT team will love knowing they won't be bombarded with daily reporting requests.)

Find your CRM champions

When paired with a comprehensive business intelligence solution, CRM software provides valuable insights into product performance and customer preferences.

This information can be leveraged to improve interactions with vendors and suppliers, ensuring better product availability and more effective supply chain management.

Identify metrics that matter

Make sure you've clearly defined what success looks like for your team. Set specific, measurable goals and determine what key performance indicators you'll use to monitor progress. Set company-wide sales goals and have individual goals for each sales rep.

Celebrate the launch

Implementing a CRM is a big reason to celebrate — and a sign of bigger wins to come.

Build some excitement around the rollout of your new solution with a party. Have some incentives for early wins, such as setting up dashboards and workflows or sending the first email campaign.

Use your CRM for company meetings and performance reviews

A CRM with built-in business intelligence and easy-to-read dashboards is a great way to showcase your company's wins. Start your company meetings by showing your sales pipeline and focusing on top accounts. Use sales rep scorecards to have more personal conversations about individual goals.

Remove legacy systems

Your sales reps may be accustomed to using familiar tools. Removing legacy systems once you've implemented your new CRM will eliminate the temptation to go back to old habits. A CRM that truly is easy for everyone to use will help ease the transition.

CRM Workflows
That Drive Sales

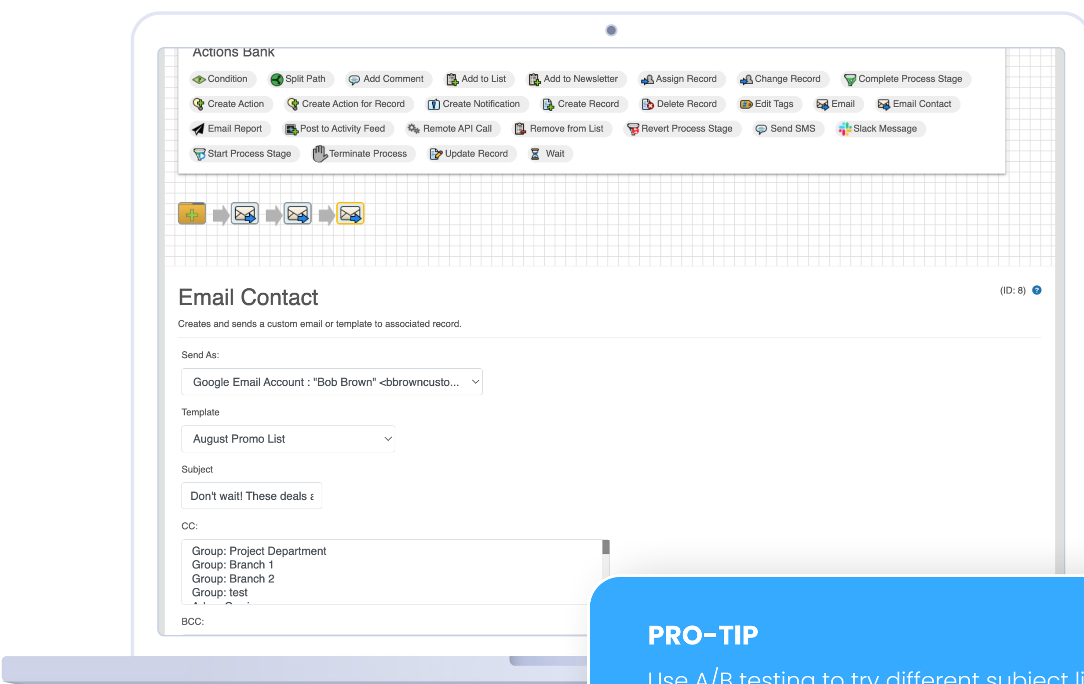
The best CRM solutions empower your entire team to work together to increase customer engagement and attract new opportunities. Here are some specific examples of workflows to help your team maximize the ROI of your CRM.

Lead nurturing workflows

While much of your team's focus is on selling more to existing customers, your team may also receive prospects from several sources, including trade shows, website inquiries, and digital advertising.

A lead nurturing workflow is a series of emails welcoming the prospect and sharing more information about what you offer with the ultimate goal of driving them to become a customer.

With a CRM that includes marketing automation, you can quickly build a series of emails using templates and schedule them to send when a contact meets certain criteria, such as requesting information or being added to a list from a trade show.



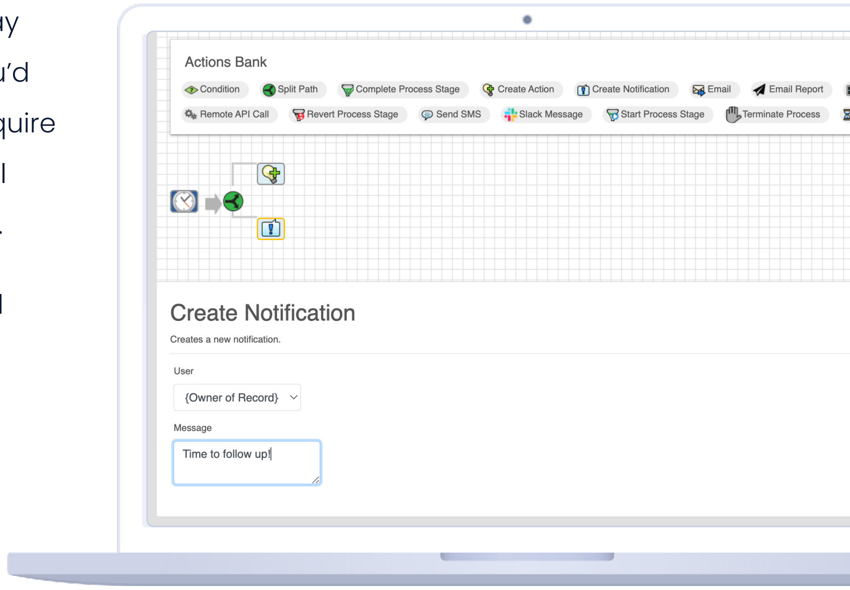
PRO-TIP

Use A/B testing to try different subject lines or calls to action in your emails.

Workflows for open deals

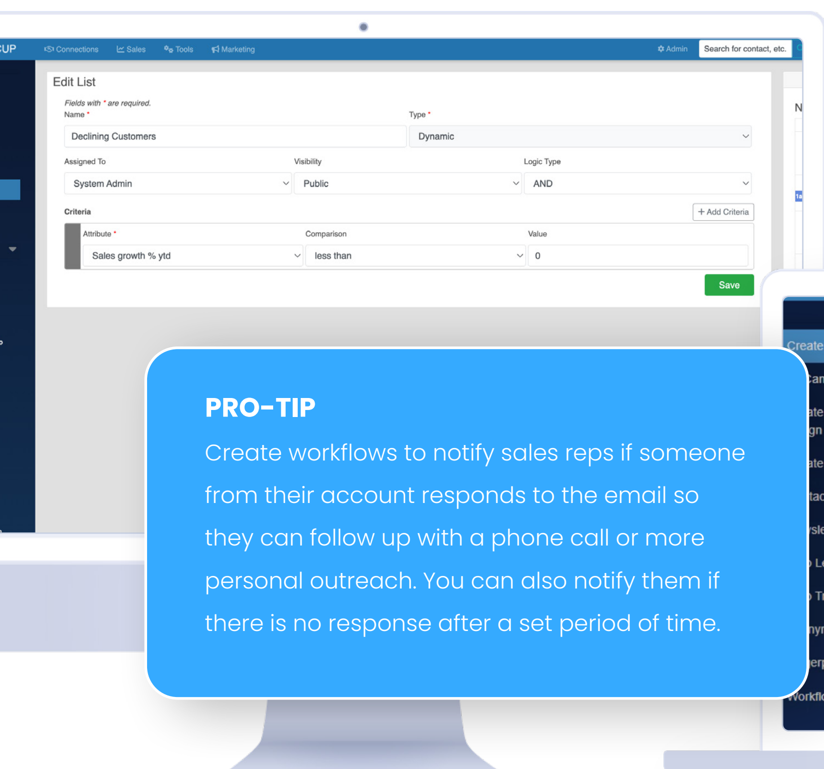
Failing to follow up on an open deal is the fastest way to lose that sale, but it happens more often than you'd think. Research from Zendesk shows 80% of sales require five follow-ups to be successful, yet almost half of all salespeople never follow up after an initial outreach.

Your team can create workflows to send automated reminders to take action on open deals, including trigger notifications for a rep to follow up with customers by email after a meeting and automated emails to customers with quotes awaiting signatures.



Workflows to customers with declining sales

With business intelligence built into your CRM, you can see which customers are becoming less engaged and send specific outreach to entice them. Create a list of customers with declining sales, select an email template, and send the email within minutes.

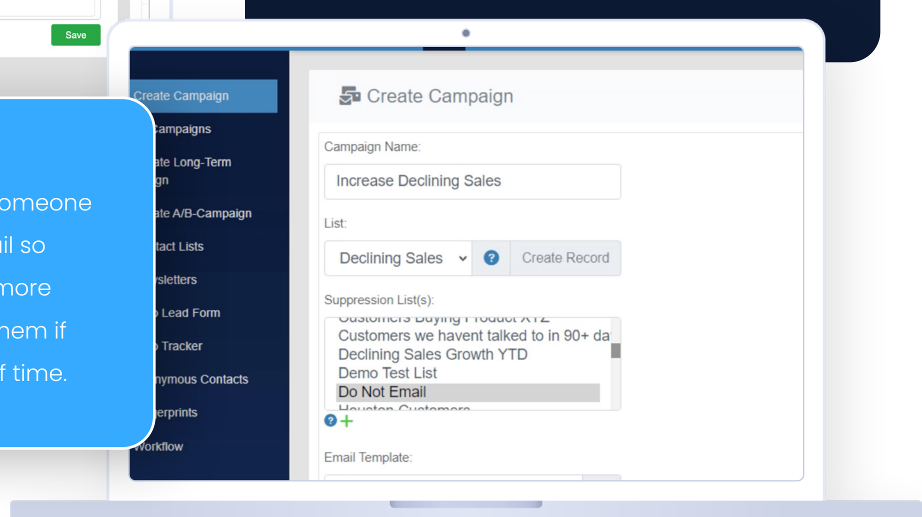


PRO-TIP

Email and link tracking can show which customers open your emails and click calls to action

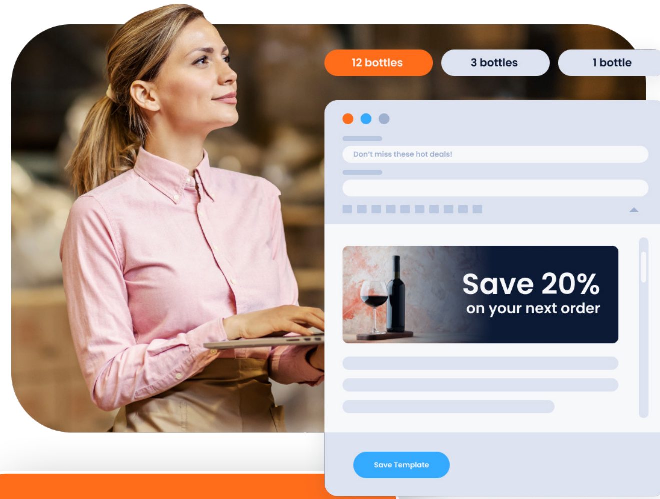
PRO-TIP

Create workflows to notify sales reps if someone from their account responds to the email so they can follow up with a phone call or more personal outreach. You can also notify them if there is no response after a set period of time.



Cart abandonment workflows

If your website allows customers to buy online, you might be surprised to learn that only three out of 10 people who attempt a purchase actually make it to checkout, according to website tracking software Hotjar.



With an integration between your CRM and eCommerce platform, you can quickly identify those potential buyers. Your team can send automated abandoned cart emails and personally follow up with others based on attempted purchases or orders.

These emails are overwhelmingly successful, with average open rates of **about 40% and click-through rates at more than 23%.**

Only three out of 10 people

who attempt a purchase actually make it to checkout.

Customer review workflows

You know your customers love you, but other prospects may not. Quality customer reviews boost your credibility. Consider creating workflows to send emails to new customers asking them to write a review.

Sales performance reports

Most sales teams have a regular cadence of reports they're required to submit on a weekly, monthly or quarterly basis. Sales leaders often review these reports with individual team members during performance reviews. Compiling them is often a tedious process, requiring support from the IT team and proficiency using Excel or similar programs.

A CRM with built-in business intelligence eliminates the need to create many of these reports by displaying critical information in dashboards. You can also schedule these reports to be sent to specific recipients on a regular basis so you're not scrambling at the end of the month.

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Set the Foundation for the Future of Distribution Sales

The right CRM software isn't just a tool.

It's a strategic investment in your customers and your company's future success. It empowers your whole team with actionable insights, fosters collaboration and aligns your sales and marketing strategies with market demands.

When your team can see the full picture of every account and contact, from the products they considered on your website to their purchasing history from the past year, you can take a more consultative approach to selling.

Schedule a Free CRM Consultation

As you consider your options, it's helpful to have a conversation with a CRM provider to see how the software can support your company's goals.

Schedule a consultation with our team to discover:

- How to ensure your CRM includes all the right data from your ERP system and eCommerce platform
- What business intelligence you can see within the software
- What workflows you can create to streamline sales and other processes
- How each team member will use the software to identify priorities and take action
- What systems you may be able to replace with White Cup CRM + BI
- What pre-built integrations and templates are available to help you get started sooner

See why more than 850 companies win more with White Cup.

Get Started Today

About White Cup

White Cup helps distributors win more deals, customer loyalty, and market share. With a powerful CRM that empowers team members to act on their best opportunities faster, business intelligence solutions that transform customer and product data into crystal-clear insights, and precision pricing software, the White Cup Suite helps distributors shift from reactive, siloed customer interactions to proactive, collaborative growth strategies.

With decades of industry experience, White Cup is trusted by more than 850 customers globally.

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Learn more at **whitecupsolutions.com**