



CASE STUDY

**Building Materials  
Distributor Triples Outbound  
Sales with Proton**

How Proton enabled inside and outside sales reps to be more proactive with their pitches

A building materials distribution company needed more insight into their customers' orders. With this information, the inside and outside sales reps could be more proactive and specific with their pitches, ensuring that all conversations with customers were as efficient and effective as possible.

## The Challenge

After launching a new sales training program, the Vice President of Sales and Marketing of a building materials distributor encouraged his team to get additional sales through outbound phone calls. The distributor wanted to increase the number and accuracy of pitches by proactively calling customers to drum up new orders.

Although the sales reps were on board with the initiative, they didn't know how to effectively pitch. What were they to talk about or highlight? While the company came up with promotions and products to pitch, the calls were too general. They weren't matching the needs of each customer. Did the customer need a reorder or a new product? Did they have low stock or supplies running short?

The other issue was their system. Although it would tell them what the customer was purchasing and how much they ordered, it didn't give the sales reps the details they needed, such as how often the customer ordered particular products. It certainly didn't give them automated reorder alerts or product recommendations.

"It was very much a guessing game," said the Vice President of Sales and Marketing. "I was asking them to make outbound calls and proactively sell, but there wasn't a way to figure out what each customer needed."

The distributor came to Proton, looking for a solution that would allow them to increase proactive sales. They needed specificity and insight.

**Industry:** Building Materials

**Proton solutions:** inside sales and outside sales

**Employees:** 230

## The Solution

The building materials distributor implemented Proton's dashboard for inside sales and the mobile app for outside sales. The company also has plans to renovate and update its ecommerce website with Proton's AI-powered recommendations.

They launched the solution during the fourth quarter of 2020 and made over \$1 million in attributed revenue. The next quarter the distributor tripled that number.

"The results are getting better and better as we go along and as the sales reps become more proficient. The attributed revenue has been phenomenal," the Vice President of Sales and Marketing said.

Even the distributor's customers have commented on the effects of the new solution. Given how busy the building material industry is after the pandemic, customers have praised the sales team for their timeliness and reminders on products that were running low. Customers have also been impressed with the accountability and proactiveness of the distributor's sales team. It's proven to be a successful nudge above the competition—setting them apart from building materials distributors who might not be using AI to increase their sales and keep their customers happy.

## Inside Sales

Proton's solution for inside sales tells reps who to call and what to sell.

### Reorder Reminders

When the sales reps receive an incoming call for an order, they can pull up the customer's profile while inputting the order. If the customer is due for a reorder for certain products, the system will alert the sales rep.

### Opportunity to Cross-Sell

Another example of the technology in action is when a customer routinely calls and orders a particular product, but they don't order the accessories or other parts that can go with it. The system has a "frequently purchased with" option

that the sales rep can use to cross-sell.

## Campaigns

Proton's solution enables the distributor to launch campaigns. For example, if a vendor has a special going on or is offering products at a reduced rate, the sales team can launch a campaign (or several at once). The AI technology will review the customer's purchase history and compare it against the campaigns going on. If there are any similarities, the system will alert the sales rep or offer suggestions for related campaigns or products.

The AI will rank the potential products for these campaigns according to the likelihood that the customer would purchase them, which helps the sales reps pitch more effectively.

"I'm letting them utilize the solution as a tool to help them augment their sales, and that's where I've seen the most success," said the Vice President of Sales and Marketing.

## Outside Sales

Although the building material distribution company has only just begun using the outside sales tool, they're already seeing results. When visiting customers, the sales rep can pull up a report of the customer's spending based on the month or year, going back as far as 12 months.

### Wallet-Share

Proton's wallet-share function allows sales reps to view their customers compared to other businesses of the same size. With this information sales reps can see what companies of a similar size and industry are purchasing and how often, then use that data to compare it with what their client routinely does. These AI-driven recommendations are an opportunity for upselling and cross-selling.

### Follow-Up Tools

The follow-up feature works as a reminder for both inside and outside sales reps. When a quote is put into the system, the solution can automate an alert after a certain period of time so reps can follow-up with the potential customer.



## Why This Distributor Has Been Successful with Proton

The Vice President of Sales and Marketing wanted to find a solution that would help the sales team with their job while also making pitching and following up with customers fun and interesting. Proton is almost game-like, with fireworks exploding on the screen when sales reps hit their targets or surpass goals.

The distributor attributes their success with Proton to two key factors:

- Selling is made easier for the sales team.
- The solution is intuitive and easy to use

After implementing Proton's solution, the Vice President of Sales and Marketing instituted a daily pitch requirement of five per day for each sales rep. Once the reps got behind the new technology, the team's pitches have increased dramatically: from 300 to 500 and now over 1,000 product pitches a week.

**“The solution has really proven itself, and it just continues to get better,” the Vice President of Sales and Marketing said.**



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