

Notepads to Next-level Field Intelligence

How an HVAC distributor scaled a data foundation with its Southeast expansion.

48 yrs

IN BUSINESS

10 → 25+

STORES SINCE 2018

4 → 15

FIELD REPS

1

SOURCE OF TRUTH

\$250K

FOUND FROM A CANCELED APPOINTMENT

Sanders Supply distributes HVAC equipment across the Southeastern U.S. The second-generation business has grown from 10 stores in 2018 to more than two dozen today, and Director of Sales Chris Zink has tripled his field team from 4 to 15 reps to close the gap on opportunity in the region. That pace of growth needed a different approach to managing data, one that made it easy for field reps to log activity on the go, sales managers to view account health, and company leadership to identify areas for expansion.

01 CHALLENGE**Outdated reporting delivered data too late to make an impact.**

Reporting relied on personal notepads and emails, with no set method for following up on opportunities. Data arrived 15 to 20 days into a month, leaving five to seven business days to recover it.

- No visibility into which accounts, reps, and actions drove value.
- Other CRMs were hard to use in the field.
- Decisions were being made on old information.

02 SOLUTION**An execution layer on top of your CRM**

Zink heard about Map My Customers from another materials supplier, who emphasized ease of use in the field. If the tool was easy for reps to use, they would adopt it.

- Reps tag managers into issues from the field to resolve them on the spot.
- Managers ensure reps put the right touches on the right accounts.
- Reps pull key account data before a meeting and walk in ready.

03 RESULTS**Higher-quality touchpoints support expansion goals.**

Reps access a customer's rebate structure, remaining factory co-op funds, and account spend to date right from the meeting room, so deals stop losing momentum.

- Field sales data flows in and out across the tech stack.
- Lead Finder™ scouts prospects on the go and new store locations.
- Managers see patterns in rep activity and coach individually.

04 GROWTH**The structure field sales companies need to scale.**

Real-time data helps Sanders decide where to grow and keeps five decades of account knowledge in the business as territory managers retire and accounts change hands.

- A field-friendly mobile experience keeps account data current.
- Managers offer in-the-moment support across the book of business.
- Pricebooks and other resources are moving onto the platform.



A customer canceled on one of our reps last-minute. Instead of going back to the office, he opened Lead Finder™ to see who was nearby, went 10 miles down the road, and found a quarter-million-dollar customer we didn't even know about. He brought them on board within a few weeks.

— Chris Zink, Director of Sales

**Want Results Like These?**

See how Map My Customers can transform your field sales operation.