

# Pivotal Technology Drives Success for HVAC Distributors

How comprehensive ERP functionality empowers operational excellence amongst distributors in today's competitive marketplace.



As with most industries, the HVAC industry is unique in the fact that most distributors do things differently; making it a challenge to find a single-source software solution that checks all the boxes needed to improve organizational efficiencies and make it easier for customers to do business with you.

In the article below, we'll discuss the tools distributors need to create an exceptional customer experience that drives sustained loyalty and consistent new business through minimized manual workflows and improved accuracy.



## Increase Customer Engagement and Loyalty

Providing customers with the right information at the right time strengthens relationships, incites loyalty, and proves your company's ability to deliver superior service over a competitor. Having an embedded CRM allows your team to access detailed customer information regardless of who picks up the phone or meets them at the counter. CRM that includes personalized customer engagement tools, purchase and price history, and a sales opportunity pipeline keeps customers top of mind and puts valuable information at your fingertips; enabling teams to easily act on sales opportunities while solidifying future orders.



## Provide Self-Service Online Access

Successful distributors are offering a content-rich webstore that allows their customers to leverage the sophistication of a physical store with the immediacy and convenience of online buying. Today's buyer expects a unified shopping experience that supports the conveniences of modern technology, whether in-store or online.

In addition, many distributors are providing their customers with a dedicated online self-service portal: giving customers access to their account 24/7, along with visibility to your full product catalog, upsell products, pricing, previous order history, and more. A fully integrated eCommerce component delivers accurate stock levels, customer-specific pricing, and convenient shipping options, so your customers can order with confidence knowing that your information is 100% accurate.



## Service Customers from Anywhere, Anytime

Built-in mobile sales tools and real-time ERP data streamlined to smartphone and tablet scale equips your sales team with the information they need to take immediate action by creating quotes and orders right from a mobile device.

Having mobile access to sales follow-ups, invoices, and customer activity history enables your sales team to take immediate action and gain a competitive advantage with the tools needed to service customers on-the-go, which is key in today's changing marketplace where remote access has become a true necessity.

## Boost Your Counter Sales

Features like single-screen order entry, quick-search capabilities, and warranty claims/return management allow you to gain speed at the sales counter while servicing your customers quickly. Your ERP should have the ability to connect electronic cash drawers, POS receipt printers, and payment card terminals, which will allow you to operate a tightly controlled and secure point-of-sale environment, providing your customers with a comfortable retail experience.



## Combat Variable Supply & Demand

Having an ERP that identifies sporadic, recurring, and unusual demand allows you to avoid overstock, balance multi-branch inventory, and achieve higher fill rates and inventory turns. Even as customer purchases fluctuate, the ability to quickly identify demand exceptions drives automated, intelligent purchase forecasts that accommodate demand swings.

Inventory management tools that are built right into your ERP system eliminate the need for manual spreadsheet management and provide a much more accurate overview of your business at any given time.

## Make Faster, Smarter Decisions

Real-time, drill-down reporting functionality ensures your team stays aware of current and potential pitfalls. Having an ERP that delivers unprecedented insight into key business metrics gives your team the power to make impactful, confident decisions based on data.

Intuitive, drill-down reporting capabilities and role-specific dashboards keep you aware of trends while diving into every aspect of your business for complete operational and financial awareness. The ability to access in-depth details and create custom reports ensures users quickly see analytics that translates into action.



Having a single-source ERP software eliminates the need for customization, minimizes hidden costs, and enables a smooth transition experience. Your software company should have a deep understanding of your customers, products, and the workflows that drive continued growth, and should offer industry-specific tools to meet your customer's demands - right out-of-the-box.

DDI System's leading-edge ERP & eCommerce technology equips wholesale distributors with the ability to drive operational excellence through improved margins, streamlined inventory, financial management, and insightful performance analytics.