



Mountain Alarm



Shantel Summers: Director of Administrative Operations

Location: Headquartered in Ogden Utah; 14 locations in 7 states throughout the Intermountain West

Description: Regional provider of comprehensive security and life-safety products and services



Mountain Alarm Optimizes Its Customers' Experience with Help from WeSuite

Nearly 70 years after its founding, Mountain Alarm remains a family-owned business but operates with the savvy and sophistication of a regional market leader. Employing approximately 320 workers and serving 85,000 customers, its management has invested wisely in human and technology resources to grow the company to its current, thriving state.

Shantel Summers, Director of Administrative Operations, is responsible for "The Customer Experience," which includes all customer-facing interactions. Everything from how customers receive proposals, to how they interact with a sales or customer service agent, to how they experience the company's products fall under her domain.

"I have some involvement with anything that can optimize the experience for our Mountain Alarm customers," Shantel says. Here, she describes how WeSuite's WeOpportunity and WeEstimate play a valuable role in supporting those efforts.

Mountain Alarm Needed:



A centralized lead management system



Easy, professional proposal generation for multiple business brands



Sharing and signing of digital documents and contracts



Elimination of redundant data entry

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It was time to bring us into the 21st Century.

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No More Sticky Notes

“As Mountain Alarm has grown in size, our business structure has changed. Calls used to go to our branch offices, and whoever answered the phone would be responsible for passing leads over to the salesperson there. They’d just write the lead on a sticky note.

With our 15th location opening soon, we now have a centralized team answering calls, and they need to get the leads and data out to the right salespeople in the field. We also want to track each lead to ensure proper follow-up occurs and monitor which leads convert to sales. We had accounting software in place that we use to manage certain customer interfacing tasks like scheduling service and keeping notes on accounts, but it isn’t designed for lead tracking.

I saw WeOpportunity at a conference, and it seemed like a tool that we could use. Mountain Alarm has been using WeEstimate to handle quoting for many years, and WeOpportunity connects directly into it, which is preferable to having two separate systems. It includes the WeSuite Go! App, which makes it easy for our salespeople to stay connected in the field. With WeOpportunity and WeEstimate, we now have an all-encompassing solution.”

“WeSuite makes us look like the professional business that we are.”

Looking the Part

“We’re a highly professional organization that’s been in business for a long time, but our proposals weren’t setting us apart from our competitors. As superficial as it may seem, the aesthetics of proposals matter. They represent our brand and affect how customers perceive us.

It’s really easy to create a professional proposal with WeSuite. Salespeople can be up and running with just an hour or so of training, and they can figure out the rest themselves. The software allows for plenty of customization. They can build a very detailed scope of work, so the customer knows exactly what they are signing for, and the operations team and technicians know exactly what the customer expects them to get done. Salespeople can upload pictures, maps, and notes that keep everyone on the same page and clarify communications. The software bridges the gap between the customer, the sales team, and operations.

We have multiple proposal templates available for use, and because we do business under several different names, we can drop in various logos and automatically create documents for the respective brands. We can also accommodate how some customers, like those in government, specifically require us to format labor and other elements within our quotes.

Most importantly, WeSuite allows us to make sure that quoting is consistent across the board. When everyone quotes the same, it’s easier to talk to customers. They don’t hear one thing from one person and something else from another. It presents our company, and our products, as a more quality offering.”

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“WeSuite allows sales teams to work across different offices and different teams with a standardization of how they present to customers.”

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Making it Easy

"We used to send a PDF of our proposals to customers, and they would have to print them out, sign them, and then figure out how to get them back to us, either by fax or scanning and emailing them. Sometimes, a salesperson would go over to the customer's office to pick them up. The process was not technologically up-to-date, and we wanted to make it much easier for customers to do business with us.

Now, using WeSuite's integration with DocuSign, we can send a quote and contract with multiple different documents in one packet to the customer, and they can pull it up on their mobile device or laptop and sign it electronically. Everything automatically gets returned to us, and we can proceed right away with getting the job set up for installation.

We've also recently started using WeSuite's leasing tool. We've built a link within our quotes, and if the customer clicks on it, they're redirected through a web browser to a third-party leasing company where they can complete an online application. Building it in like that, instead of having all the lease paperwork completely separate, streamlines the customer experience and helps our sales team close more quickly.

A salesperson can now build and have a very simple quote to a customer within 5 to 10 minutes, whereas before it could take up to a half-hour. The time savings are even more significant with larger projects. And, of course, we're saving the customer time too. They can get a signed contract back to us in seconds."

*"Quoting and getting it to the customer is really fast, and it saves time for the customer too. **They're not having to print out the proposal, sign it, and scan it to send it back.**"*

Eliminating Errors

One of the biggest game-changers for our business, in terms of simplifying our processes

and saving time, has been the integration between WeSuite and our accounting and scheduling software. We can now import data directly from WeSuite into Sedona, and that has turned what used to require about 45 minutes of manual data entry time into a few simple clicks. It has also eliminated opportunities for mistakes or inconsistencies to be manually entered into our database, making everything run more smoothly for customers and the operations team. Plus, our sales team always has the most current pricing available, as WeSuite pulls it from Sedona in real-time when building a quote.

We also take advantage of WeSuite's automated approvals. The software gives us a lot of flexibility to set parameters both at the branch and corporate levels. For example, we have a baseline gross profit margin that all quotes must meet companywide. However, at the branch level, managers can set different approval thresholds for salespeople who have been on the job for 20 years and know what they're doing, versus new hires who should have hours and parts checked before a quote goes out. Because the process is automated online, we have been able to keep approvals happening seamlessly even while most of our staff is working remotely during the pandemic. Again, this works to the customer's advantage; they have continued to get quotes from us quickly while our management is confident that they're all inclusive and accurate.

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"Being technologically up-to-date with tools like DocuSign and quoting software that our salespeople can use from anywhere allowed us to remain profitable throughout the pandemic. We suffered no negative impact."

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Valuing the Customer Experience

Just as we want our Mountain Alarm customers to value their relationships with us, we can tell that WeSuite wants it to be as easy as possible for our company to do business with them. They're great to work with! At the end of the day, it's the relationship that has made us successful in using WeSuite's solutions and accomplishing what we need the software to do to grow our business.

There are many products out there that we could use, but we wouldn't have the same relationship with them, and they don't understand our business as well. I think that's what has been most integral to our success.

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“There has never been anything that WeSuite couldn't help us figure out. Whatever we need the software to do, WeSuite finds a way to make it work.”

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WeSuite 
Growing Sales Strong



www.WeSuite.com



info@wesuite.com
wesupport@wesuite.com



155 Lafayette Avenue
White Plains, New York 10603



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