



Washington Alarm



Stephanie Olson: Business Analyst

Location: HQ in Seattle WA; Branch office in Bellingham, WA

Description: Regional provider of commercial and residential security and monitoring services



Getting Organized and Quoting More Accurately Keeps Washington Alarm Competitive

Washington Alarm, Inc., of Seattle, is a busy company in a thriving market. Founded in the mid-20th Century, this family-owned business has served the public for generations. However, for companies like Washington Alarm, a venerable history still requires keeping an eye on the future. Here's how WeSuite is helping Washington Alarm stay competitive well into the 21st century.

Washington Alarm Needed:



Keeping Sales and People Organized



Easier and More Accurate Quoting



Integration with the Company's ERP Platform



Professionally Branded Proposals

“

Since we deployed WeSuite, we're a lot more organized because the software encourages us to follow a systematic approach to our entire sales process.

”

Running More Smoothly

“Washington Alarm has been offering personalized systems, expert advice, professional service, and a fair pricing structure to clients in Washington State for more than 70 years—since 1943. We provide commercial monitoring, installation, and managed access, as well as commercial and residential security, fire, surveillance, automation, access control and environmental monitoring systems. We’re one of the largest providers in the state of Washington, with about 75 employees. In addition to our headquarters in Seattle, we also have a branch office in Bellingham, near the Canadian border.

Since we deployed WeSuite, I’ve seen the company run more smoothly. There are really three major areas. First of all, we’re a lot more organized because WeSuite encourages us to follow a systematic approach to our entire sales process. This makes us more organized, which helps us instill in our customers a sense of confidence in the services we’re offering. Secondly, there’s improved accuracy in our quoting, thanks to the WeSuite approval system. And third, the fact that it integrates cleanly with our financial platform, which handles all of our accounting and inventory, just makes everything run much more efficiently. All of these factors combine to help us with our overall sales process, and they’ve been particularly helpful with how we generate quotes and proposals.”

“

“If prices are changed in our financial platform, WeEstimate pulls the pricing straight from there so we always have current pricing.”

”

Complete and Accurate Quoting

“WeSuite has helped us with quoting accuracy in a number of ways. To start with, we recently finished working with WeSuite to build a new proposal document within WeEstimate which specifies everything that needs to be included in each quote. Before that, it was easy to miss something such as a miscellaneous item, which could include a part needed to complete the job.

Then, there is the accuracy of pricing, which is completely automated thanks to the ERP integration. Before we had these two systems in place talking to each other, if pricing was adjusted, the new amounts did not always make their way to WeEstimate right away. Now, however, if prices are changed in our financial platform, WeEstimate pulls the pricing straight there so we always have current pricing.

For most of our projects, we select from generic packages we have designed to meet the needs of small businesses and homeowners. Then we add a few things onto these packages to customize them, based on what we are trying to accomplish for the specific customer or their business.

To generate the customized quotes in WeEstimate, in addition to selecting the right parts and packages, we use the labor tab and we use the chargeable items tab for things such as permits and wire. We also include the freight and warranty calculations. We have our terms and conditions in there too. Additionally, our projects include recurring monthly revenue (RMR). RMR is very big for us.”

*“The difference in our proposals now, compared to **how they looked before we had WeSuite, is night and day.**”*

Killer, Turnkey Proposals

Before we had WeSuite, Salespeople would write the Schedule of Protection in a Word document and use a spreadsheet to calculate the parts and labor. An admin would have to put this information into our Terms and Conditions,

Continue

which were then mailed or emailed to our customer. It was difficult for Operations to review the job prior to the sales team bidding it. There was really no consistency; the proposals were just all over the place.

We have been able to customize what our proposal package looks like. WeEstimate makes it very easy to quote. When our salespeople go into WeEstimate to put together a proposal, we have already prechecked everything that should be included: a stylized cover page, a cover letter with a "Hey, thanks for choosing us. This is what we offer" message, terms and conditions, chargeable items, an emergency contact list, and company contact list by department. For our scope-of-work document, WeEstimate now pushes our scope of work onto the investment summary page.

We also use DocuSign as part of our process. Formerly, our contracts were signed as print versions. Most of our documents were hand signed. Customers would print out the PDF, sign it, scan it, then email it back to us. This takes time. The integration between DocuSign and WeEstimate has definitely made things a lot easier and speeded up how quickly we can close a deal."

A Consistent Approval Process

Before WeSuite, our salespeople would type up their quotes and send them off. Nothing was really approved beforehand. We did not have a consistent approval process in place.

Today, we have dedicated people who make sure a proposal does not go out unless until it is checked and approved by our Operations Department. The WeEstimate software automates the process, making sure that anything that requires approvals is shared with the right person or people who are authorized to review and approve it. The documents literally cannot be sent until they are approved. As would be expected, the approvals might take a little longer, but for the sake of accuracy and Operations receiving a job that is ready to install, the automated approvals through WeSuite have been amazing.

What is really great is that, through the software, we have been able to customize the conditions for the approvals process, defining when approvals are necessary and when they are not. We have established that on certain types of proposals which fit pre-established criteria, the salesperson can just run with it.

Continue

“

Documents literally cannot be sent until they are approved; we've been able to customize the .

”



For example, in our Bellingham office, both salespeople are very senior. They have been doing this a long time and rarely make mistakes. For them, as long as the sale is within their threshold, they can send out a quote on their own. If it goes over the threshold, one other person needs to sign off on it. But at our Seattle office, by comparison, there are newer people. For them, we have three different approval systems, and they have a much lower threshold.”

“WeSuite has a lot of potential that we are still in the process of tapping. We will soon be taking advantage of its automatic commission calculation, which will make our process much less convoluted and more efficient.”

Organized Employees are Happy Employees

“Our salespeople really like the way WeSuite keeps them organized and how well everything is laid out within the software. For example, they can create customized project folders which show the types of systems and all the devices underneath. If they want a fire system, they go to the fire system folder and see what kinds of smoke detectors are available. They can drill down and see all the parts. It just makes it really easy for them. Even people who are not naturally very organized are forced to be organized with WeSuite!”

“

There’s definitely an advantage to working with a company who comes from the security industry, speaks our language, and really understands our business.

”



Top Notch Support

“Whenever we’ve had to reach out WeSuite’s support team, the experience has been great. Most recently, during the process of revising our proposal documents, we had some hiccups, but everyone at WeSuite has been great to work with in getting problems resolved.

When I go to speak with their team about an idea—something I’d like the software to be able to do, for instance—they truly understand our questions better. And, for support calls and technical assistance, it makes a big difference. There’s definitely an advantage to working with a company who comes from the security industry, speaks our language, and really understands our business.”

WeSuite 
Growing Sales Strong

 www.WeSuite.com

 info@wesuite.com
wesupport@wesuite.com

 155 Lafayette Avenue
White Plains, New York 10603

 Scan code to see our other case studies