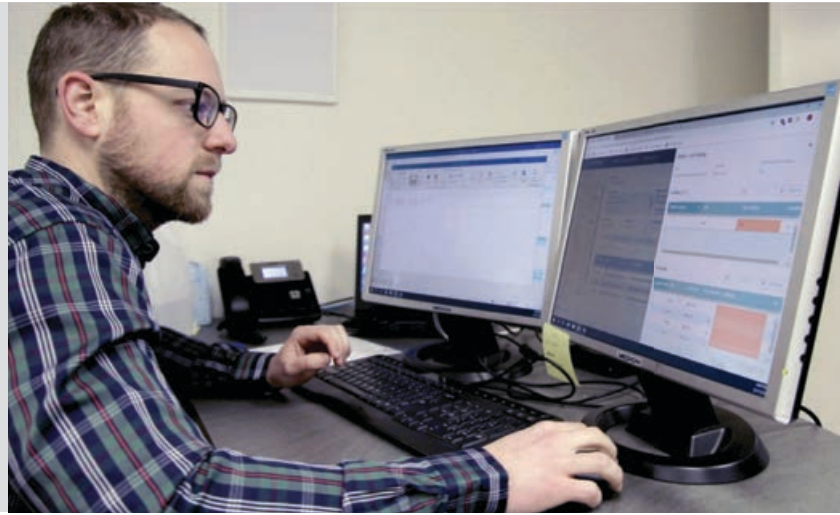


Case Study

American Storage and Logistics

PRODUCTS USED
SALESPAD CLOUD



THE COMPANY Based in Grand Rapids, Michigan, American Storage and Logistics specializes in new and used material handling equipment. They offer turnkey design, installation, and teardown services for pallet rack, mezzanines, shelving, and in-plant offices.

By combining delivery, installation, inventory, and design all under one roof, American Storage can offer more affordable storage solutions and take the burden of project management off an operator's shoulders.

THE CHALLENGE James Wiese, President of American Storage, says that their main goal is to make warehousing easy, which, as anyone who works in a warehouse will tell you, is no easy feat. In addition, customer relationships are highly valued at American Storage; it's vitally important to the company that they are able to follow through on what their customers need from them.

When Wiese joined the company, they were operating from a homegrown ERP system that was more of an elaborate set of Google Sheets than an actual ERP solution. The average time to create a quote was up to 20 minutes, and there was a slew of issues relating to pricing, as each sales rep was responsible for describing and pricing out the different inventory items on each order. Tracking customer or vendor purchasing history was next to impossible, visibility into their pipeline was cloudy at best, and there were several large accounting hurdles as well.

In short, American Storage was overdue for a complete systems overhaul. That's where we came in.

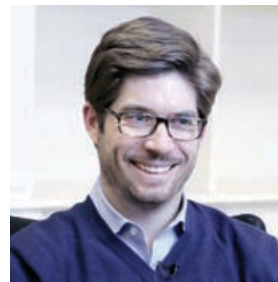


AMERICAN STORAGE
AND LOGISTICS

American Storage and Logistics | Grand Rapids, MI
www.aslmhc.com

KEY BENEFITS GAINED WITH SALESPAD

- Faster quoting and order fulfillment
- Accurate order and inventory history
- Access to crucial inventory data
- Better reporting capabilities



James Wiese
President



Zack Krywyj
Business Development
Manager

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“ON OUR OLD SYSTEM, IT WOULD TAKE ME 25-30 MINUTES JUST TO QUOTE A JOB. NOW, WITH SALESPAD, I CAN DO IT IN 5-10 MINUTES. I CAN EASILY SEARCH FOR LINE ITEMS AND GET THAT QUOTE OUT THE DOOR FAST ... SALESPAD CLOUD HAS MADE MY LIFE MUCH EASIER.”

Zack Krywyj, Business Development Manager



THE SOLUTION **SalesPad Cloud.** When American Storage made the switch to SalesPad Cloud, they also migrated from QuickBooks Desktop to QuickBooks Online.

“It’s completely different, now, in every possible good way,” said Wiese. “Our employees can log in from wherever they are, whether that’s at home, at the office, or at the local coffee shop—the mobility aspect is great.”

Switching from the server-based QuickBooks Desktop to QuickBooks Online made a big difference for American Storage inventory management practices as well. QuickBooks Desktop limits the number of inventory items a company can work with. With QuickBooks Online, however, there is no cap on inventory items (there is also no cap in SalesPad Cloud). This flexibility means that inventory finances are more accurate and easier to control, giving Wiese and his employees access to project-specific gross profit, monthly and weekly gross profit, and more.

“You can’t see that in QuickBooks Desktop,” continued Wiese. “As much as you want to, it’s just not going to happen.”

Now that they’re operating from QuickBooks Online and using SalesPad Cloud to manage their inventory, American Storage is able to make better decisions as a company, and they have crucial insight into how those decisions affect their bottom line.

FASTER QUOTING AND ORDER FULFILLMENT WITH WORKFLOW VISIBILITY

Creating a quote for warehouse storage solutions can be pretty involved, due to the number of variables, and a quote from American Storage can range anywhere from \$200-\$25,000, depending on the project. Because their quotes can be so complex, it’s critical to get it right the first time, for efficiency’s sake. Zack Krywyj, Business Development Manager at American Storage, recalls the days before making the switch to SalesPad Cloud.

“On our old system, it would take me 25-30 minutes just to quote a job,” he said. “Now, with SalesPad, I can do it in 5-10 minutes. I can easily search for line items and get that quote out the door fast. I can also easily check on the status of a job if I have a customer who wants an estimated ship date or something along those lines. With the old home-brewed system, it took a couple of emails and a half hour or so to check up on the status of a job, so SalesPad Cloud has made my life much easier.”

Wiese also appreciates the increased quoting and order fulfillment efficiency.

“Cutting out all that time frees us up a lot,” he said. “So our sales reps can be out finding more customers, rather than developing quotes.”

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“BEFORE SALESPAD CLOUD, WE SPENT A LOT OF MONEY AND MAN-HOURS MANAGING OUR INVENTORY, AND IT WASN'T ACCURATE. WITH THE SUBSCRIPTION TO SALESPAD CLOUD, THOUGH, WE'RE GOING TO SAVE MONEY, AND WE'RE GOING TO MAKE MONEY. IT'S GOING TO PAY FOR ITSELF VERY QUICKLY.”

James Wiese, President

Beyond making sales transactions easier, SalesPad Cloud also helps Krywyj and his team stay on top of order fulfillment by utilizing workflows.

“As soon as I receive an order, I'm able to view it in SalesPad,” said Krywyj, “and an email is sent to our Director of Operations, who can begin pulling the order. With the old system, when we got a purchase order, we had to create an order in the system and email the order to three people, who then had to print it out and take it down to the warehouse. Now, it's instant.”

Instead of doing everything manually, Krywyj is able to forward orders through workflow as soon as they arrive, speeding up the fulfillment process. And because workflows in SalesPad Cloud offer easy visibility into the status of every transaction, higher-ups like Wiese can check in on the company's pipeline.

“I know in the next six weeks what's going to hit, because I can see it in the system,” said Wiese. “That's great.”

BETTER ACCESS TO HISTORICAL DATA AND MORE ACCURATE REPORTING

Before switching to SalesPad Cloud, American Storage tracked inventory on a Google Sheet, which meant that they had no backwards visibility into their data.

“You couldn't see how much you'd sold of what, or when,” said Wiese. “We needed to be able to see historical data in order to inform our purchasing decisions.”

Wiese went on to explain that, for a company like theirs, inventory demand can fluctuate pretty dramatically. Pallet rack sales for June, for example, might run up to as many as 100,000 units, while in January they might not sell any pallet racks. Failing to account for this historical data can lead to big problems for the company come restock time, as they have an 8-12 week lead time with their vendors. If they don't purchase the right materials, they run the risk of stocking up on inventory they can't sell, or failing to stock up on what their customers really want.

“We actually know what we sold now,” said Wiese, “so we can go back and calculate what we need to purchase to keep a month's worth of inventory on hand.”

Additionally, better record keeping with SalesPad Cloud helps American Storage keep their customers happy. Previously, each employee typed out their own descriptions of products and set their own pricing on orders.

“So, if a customer called us and said ‘I need more rack, sell me more of what you just sold me,’ we couldn't. We didn't know what we'd sold them,” said Wiese. “Versus now, when we can go back and see exactly what we sold them. There's no second guessing, no questions, no site visit. Just a simple reorder.”

Now that they can trust their historical data, American Storage is able to create better reports to help guide their decisions. Krywyj makes heavy use of sales data reporting capabilities.

“With our old system, we weren't able to report on any of those numbers in a succinct way. Now, with SalesPad, it's really easy for me to just run a sales report for the weekly reporting that we do.”

Beyond all the practical improvements, Wiese values the savings that SalesPad Cloud brings.

“The advantage of SalesPad Cloud is that each and every project automatically has a gross margin attached to it. We have true monthly financials now — when you don't truly believe your financial reporting, it's scary. Automating all these basic functions [through workflow] lets you get at the space between your employees' ears so that they can focus on questions other than ‘Did you do that right?’

“Before SalesPad Cloud, we spent a lot of money and man-hours managing our inventory, and it wasn't accurate. With the subscription to SalesPad Cloud, though, we're going to save money, and we're going to make money. It's going to pay for itself very quickly.”