

# Case study

“What an amazing tool! 100% compliance and a rise in selling opportunities – who could argue with that?”

Peter Reeve, Commercial Director, Stepper UK



**The industry:** Manufacturer of Optical Instruments

**The location:** Europe

**Number of field sales:** 5 - 15

## The background:

With many independent and national chain opticians among their portfolio of clients, Stepper is established as one of the most successful and highly respected suppliers of quality ophthalmic frames in the UK.

## The enquiry:

Stepper UK's sales force historically operated using a manual based system, which limited communications with the field team and wasn't providing managers with up to date data for them to make timely decisions.

Peter Reeve is the company's commercial director and he was looking for a solution which could improve communications and provide real time sales activity without placing a burden on his team.

“The historical systems reporting facility was near impossible to extract relevant information from. I'd come across other SFA tools in the past which claimed to be able to do this, but compliance levels were a real issue.” Peter goes on to say, “Sales people, in my experience, tend to leave inputting customer information which hadn't generated orders until the end of the day or even week. Reporting is always seen as a lower priority, and it is felt that valuable time should be spent with clients, not fathoming your way around a complicated CRM tool, in which most fields seem inappropriate.

“I was looking for a solution which was simple to use, not time consuming for my team and that could provide real time data. A contact of mine recommended i-snapshot – he said that he hadn't come across anything like it.”

## The success:

Within 6 working weeks from the first meeting with the i-snapshot sales team, the system was live.

“I was extremely impressed at how quickly the tool was implemented, and how well our sales team took to it. The simple coding means that at the end of each visit, the sales person sends a simple text message, and that's it – their reporting is done. Long gone are the days of piles of paperwork to complete at the end of each day or week!

“We are proud to say that we have 100% compliance, much better than I could ever have hoped for, and because the data inputted is top quality, the activity information generated is as accurate as it could ever be.

“It has given me invaluable outputs. Through the web based reporting system, which is also extremely easy to use, I have been able to see very quickly, in real time, areas where we need to refocus efforts. I have already identified trends in client ordering, so our sales effort can now mirror this - enabling us to be slicker than ever before.

“I would recommend this tool to anyone!”



**i-snapshot**

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