



ROBERTSON SUPPLY AND SALES MANAGEMENT PLUS

Robertson Supply, headquartered in Nampa, Idaho, has nine locations throughout Idaho and Oregon, is a 60-year old, family-owned plumbing and industrial supplier, with a diversified business base including residential and commercial plumbing sales, domestic and industrial pump supplies, agricultural supplies, HVAC and appliances.



- HQ: Nampa, ID
- 9 Locations
- ERP: Mincron
- Family-owned plumbing and industrial supplier

Mark Michels, Vice President of Operations and Byron Morgan, Vice President of Sales, are leading the way with Sales Management Plus, and played key roles in the implementation process as well. The two shared with us that SMP enables them to quickly pivot based on market conditions, and make sound decisions about where to focus their time and energy to ensure organic growth across the company. And it's paying dividends – the company is on track, targeting another year of double-digit growth.

"We could tell from the get-go this was going to be a great thing for us. It was almost a no-brainer to run with SMP."

– Mark Michels, Vice President of Operations

Before SMP, Mark shared, Robertson certainly had access to key information via their ERP. Running queries for the salesforce was a key job function of the executive team – something that was time-consuming, and could not always be completed in appropriate time to act upon the data discovered as a part of the query. In fact, both Mark and Byron note that this is one of the things that made SMP so attractive to their team from the get-go. "Information is key," Mark said. "Having the data at your fingertips and mining anything you need for the salesforce is so important. Time lags would cause issues before, and there's a value to do this quickly. We can now pinpoint and easily identify those business opportunities that are out there. Having it all at our fingertips and quickly accessible is key."

In the past, the two conceded, some opportunities simply passed them by because they could not identify the opportunity or quickly take action to capitalize on it. "We could not ID market shifts quickly – in the past it might take 8 months to a year for us to spot the



trends – for specific customers or a product segment altogether,” Byron offered. “Now we can drill down and ID those patterns much more quickly and pinpoint all the way down to the geographical area and to the specific customer accounts and see exactly what was going on.”

They both point out that while SMP has helped them identify holes and sales opportunities throughout the business, it really also helps identify areas where they’re winning as well, and they use that as motivators for their team – congratulating sales teams, managers and sales reps for jobs well done. This is something in sales that often gets overlooked, but celebrating wins together can really play a large role in getting everyone engaged and taking ownership. “Accountability is now key – we know they have access to the data, and it eliminates the excuses,” acknowledges Mark. “But the team has really taken to it because we all want to grow our product lines and be successful. It’s easy to drill on the negative, but we really have to give out the ‘atta boys’ when we can as well.”

Robertson Supply went live on SMP in the Spring of 2016, and the two admit they’ve barely scratched the surface with everything SMP has to offer. But, their team saw ways to achieve an immediate return on their investment simply by using some of the core functionalities of SMP, and the two made it their mission to focus on those key pieces and ensure everyone on the executive team could harness the power of the SMP data. The company’s goal is to build upon the core functionality they’re using within SMP today as a means to continue honing their own processes and growing their business even more.

“We could tell from the get-go this was going to be a great thing for us. It was almost a no-brainer to run with SMP. And the sales managers are consistently wowed by how much info they have at their fingertips. It’s not just at the product level or what have you, they’re going all the way down to the customer level to review profit levels, what they buy, do not buy, etc. and it’s great to have a tool to mine all that info – the good and the bad,” Mark adds.

At the end of the day, when discussing the wholesale plumbing industry in general, Mark and Byron note that the industry continues to evolve, which is why Robertson Supply has chosen to stay focused on diversification. In the future, online marketing and online sales

A photograph showing two people in a business meeting. One person is pointing at a laptop screen displaying a software interface with a bar chart and data tables. The other person is looking at the screen. The background is a blurred office setting with a desk and glasses.

could continue to set the market conditions, they both noted. Despite the changes over time, ensuring you know the customer and their needs is pivotal. “At the end of the day, it’s providing a recognized value to our customer. Anything we do we try to take it to that next level and show that value – time-saver technologies, such as online ordering, published online shipping calendars – and move away from a simply price-based transaction. Our customers appreciate that. They really enjoy doing business with us,” Mark said in closing. His team’s goal is to continue to dive deeper into all the data SMP can offer them, as a means to help them continue to deliver that ‘recognized value’ over and over again.

SALES MANAGEMENT PLUS

Sales Management Plus is a leading CRM and business intelligence application designed for wholesale distributors. SMP is a “cloud-based” application that integrates with your ERP application to leverage important information such as accounts, contacts, and historical transaction data. For more information please visit www.gosmp.com, or call **(949)258-0410**