



WarmlyYours Eliminates Paper Trail with Oncontact Software

Floor heating company utilizes Oncontact CRM to advance its sales process



About WarmlyYours.

WarmlyYours, a radiant electric floor heating company, specializes in customizing heated floors for any room in a home to provide a more comfortable and inviting living space. Installed in thousands of homes across America, the electric radiant floor heating systems are designed for easy installation under tile, natural stone, carpet, hardwood and laminate.

WarmlyYours' mission has always been to offer the finest customized systems and services in the industry. In addition to its customized solutions, the company equally strives to provide the same customized service to meet individual needs and expectations.

A homegrown business beginning in the basement of the owner's house, WarmlyYours achieved early success with substantial business growth each year. As the company grew, it realized that in order to uphold its mission statement, it needed to centralize its data and automate the sales process to provide the superior service customers had come to expect.

Initially, WarmlyYours implemented a customer relationship management (CRM) solution and used a paper folder process to manage customer orders. However, this method quickly resulted in a long paper trail and inefficiency across the company. To alleviate this issue, WarmlyYours upgraded to a more robust CRM solution with Oncontact Software's Oncontact CRM.

"We selected Oncontact because they are experts in the mid-market," said Christian Billen, director of IT, WarmlyYours. "At the time of implementation, we only had six users and Oncontact provided us with an effective solution that fit the needs of our company."

Streamlining the Sales Process

The sales cycle to create a WarmlyYours customized, heated floor plan is an extremely detailed process. To begin, a customer submits their floor plan via fax, PDF or scan. WarmlyYours then sends the file to its India office where the plan is created and drafted. Upon completion, the plan is sent back to WarmlyYours and the sales person develops a quote and faxes it back to the customer. Using the paper-based system to carry out this process, the company experienced a frequent loss of customized floor plans. The system also lacked the ability for employees to track the status and location of floor plans throughout the process.

By using Oncontact CRM, WarmlyYours can now centralize its data to provide its sales, marketing and customer service teams with a full view of the customer and the up-to-date data needed to complete the sales process efficiently. Centralizing the process and eliminating the paper folder system has dramatically reduced the number of lost floor plans thereby improving customer service.

Challenges

- Needed to centralize data and automate the sales process
- Long paper trail created inefficiency across the company

Solution

By purchasing Oncontact CRM, WarmlyYours was able to find the customization and flexibility it needed at an affordable price.

Results

- Centralized data to provide its sales, marketing and customer service teams with a full view of up-to-date information
- Reduced the number of lost floor plans and improved customer service
- Built workflow and business rules into the application to ensure business ran as smooth as possible

“Oncontact Software provides us with an excellent tool and fantastic service.”

- *Christian Billen*
Director of IT
WarmlyYours

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In addition, to maximize the effectiveness of the solution, WarmlyYours spent a year customizing the software using Oncontact's toolkit to build its workflow and business rules into the application, creating a functional, user-friendly system for its employees.

"Our original paper-based process became very messy, causing us to lose a lot of imperative data," added Billen. "With Oncontact, we personalized the solution by custom-tailoring screens to track activity and notes as well as incorporate workflow and quotations to ensure our business runs as smooth as possible."

An Affordable and Feasible Solution

In its search for a CRM tool, WarmlyYours realized that it was possible to spend nearly six figures for a customized solution that would fit its specific needs. As a start-up company, such an expense was not feasible. However, by purchasing Oncontact CRM, WarmlyYours was able to find the customization and flexibility it needed at an affordable price.

During its search, WarmlyYours also realized that many vendors sold the CRM application but did not include the support necessary to take advantage of the solution's entire functionality. Many companies only provide this support by selling additional consultation packages, which are often pricey. However, Oncontact offered its software on a straightforward per-user fee. There were no server fees or third-party products required to integrate data and no hidden charges that are often found with other vendors.

"The implementation with Oncontact CRM was a pleasure," said Billen. "Other vendors charged for the support necessary to get the tool up and running, but Oncontact offered the unlimited support we needed to capitalize on the solution's offerings."

Help is Only a Call Away

Since implementing Oncontact CRM, WarmlyYours has been pleased with the level of service provided from the deployment process to ongoing troubleshooting and support. WarmlyYours never feels out of touch with the support team and is confident that any problem called in will be solved in a timely manner.

"Oncontact Software provides us with an excellent tool and fantastic service," said Billen. "It's great to pick up the phone and talk to a real person that knows the software inside and out. Most vendors don't have the knowledge and experience that the Oncontact staff has with its software."