HANDSHAKE / *Milwaukee*®

The Power of Giving Reps Mobile Access to Complex Promotions

How leading hardware distributor Milwaukee Tool enabled reps to have more efficient sales conversations in the field with Handshake's order entry software.

Promotional pricing can be necessary to retaining key accounts in manufacturing and distribution.

For manufacturers and distributors across industries, promotional pricing can be necessary to retaining key accounts. The fiercely competitive power tool industry is one such example—a selling landscape historically optimized around special pricing and promotion-based selling.

Milwaukee Tool, manufacturer of heavy-duty power tools, accessories and hand tools, maintains their industry-leading position in the space with product innovation, expert salesmanship, and a deep understanding of this promotion-based sales strategy.

According to Derek Erickson, Milwaukee Tool's Director of Channel Marketing:

> "The power tool industry is very competitive. Without promotions and heavy advertising, you won't get the market share gains you want. An account will likely go in a different direction."

With a field sales team servicing accounts at trade shows and retail store visits across the United States, Milwaukee Tool was experiencing rapid growth that was causing them to outgrow their manual, promotion-heavy sales operation. This case study is an account of how Milwaukee Tool used Handshake's order entry software to automate and scale their field sales operation without having to sacrifice their complex promotional and pricing structures.

The Importance of In-Person Sales

The field sales rep plays a critical role at Milwaukee Tool. Typical of industries distributing technical products, the sales conversation is highly experiential, often involving demos and product education initiatives that are best done in person. For this reason, trade shows and field sales visits remain priority venues to showcase new products and write orders.

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Director of Channel Marketing

Milwaukee Tool's previous order writing and submission process was tedious and error-prone.

Milwaukee Tool attends up to 40 trade shows a year, with the bulk of orders coming through 8 key shows held by the top four hardware retailers in the U.S. Reps encounter both new and existing customers at these shows.

New customers approach the booth, and reps attempt to convert these conversations into new sales orders. Existing customers often book in advance, placing bi-annual orders with reps at a predetermined time.

Milwaukee Tool optimizes their booth space to accommodate both types of sales conversations, providing an environment for reps to walk buyers through specials and demo new products.

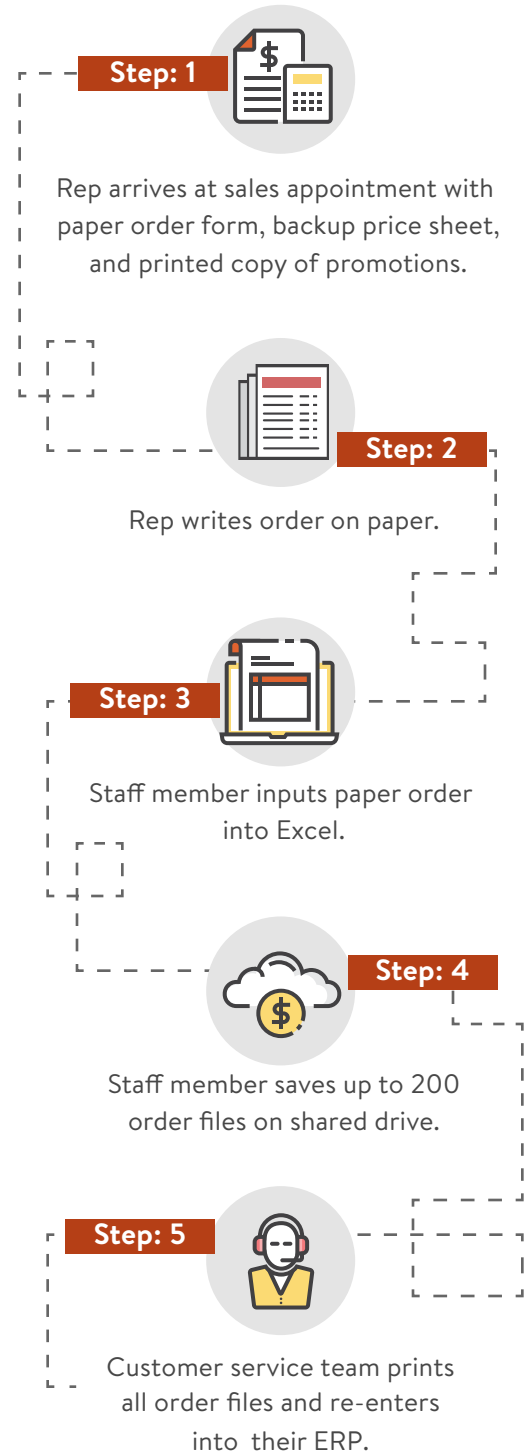## Before Handshake: A Tedious Order Writing Process

Before Milwaukee Tool automated order writing and submission with Handshake's mobile order entry software app, their multi-step sales process was tedious and error-prone. At each sales appointment, reps had a blank sheet of paper to write the order, a backup price sheet to cross-reference customer-specific price eligibility, and a printed copy of a PowerPoint deck outlining current promotions.

At trade shows, a staff member had to be on hand at all times to enter orders into Excel. These spreadsheets were then saved on a shared drive—up to 200 files at a busy show. Back at headquarters, the customer service team would print all the orders and then enter them manually into JD Edwards, their ERP at the time.

With this slow, multi-step system, sales appointments could take hours, wasting precious time that reps could be spending with other buyers. Said one rep about their previous process:

"Sometimes I would spend two to three hours on an order, because I would have to manually look things up. And that might not be a big order, either, so it wasn't a good return on my time investment. And at the end of the day, I would have to spend two to three hours in my hotel entering orders into the order builder."

Milwaukee Tool's Order Writing Process, Pre-Handshake:

Step: 1

Rep arrives at sales appointment with paper order form, backup price sheet, and printed copy of promotions.

Step: 2

Rep writes order on paper.

Step: 3

Staff member inputs paper order into Excel.

Step: 4

Staff member saves up to 200 order files on shared drive.

Step: 5

Customer service team prints all order files and re-enters into their ERP.

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Milwaukee Tool needed a solution that would boost efficiency and allow reps to be mobile.

In addition to wasted time, reps often weren't able to provide accurate order totals to buyers until hours after the sales conversation, given the number of specials and promotions that needed to be applied. What's more, the number of steps in the process introduced many opportunities for errors, whether it was from misread handwriting, typos, or other data entry mistakes.

As Erickson explains, "there wasn't anything good about this process at all. We managed through it because we had good salespeople, but as we grew we needed more manpower to stay efficient, especially at big shows where volume was really high."

Frustrated with these manual processes, the team attempted a first step towards a more digital selling process by arming reps with laptops at store visits and trade shows. In these scenarios, reps would enter orders directly into Excel during the sales conversation. However, it soon became clear that having reps sitting in front of a laptop was a poor experience for the buyer. They needed an order entry software solution that would boost efficiency but also allow reps to be mobile—walking around the store or trade show floor— and engage with buyers in a more interactive selling experience. This is what led them to Handshake.

Solution Requirements

Given Milwaukee Tool's rapid growth and frustration with their sales operation, the team was looking for an order entry solution that could accommodate their specific business needs:

1. **It had to be mobile.** Because Milwaukee Tool's experiential selling process required reps to showcase products live, talking through promotions and walking around stores and the trade show booth, reps needed a tool that would give them the freedom to move.

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>
> Derek Erickson
> Director of Channel Marketing

2. It needed to accommodate complex promotions. Given Milwaukee Tool's promotion-based sales strategy, they needed an order writing solution that could not only handle basic tiered pricing and discounts, but also more sophisticated promotional logic that accommodated customer-specific volume discounts, buy-this-get-that promotions, and more.

3. It needed flexible search capabilities. While reps would often search items by part number, they also needed the ability to search by keyword. This would allow reps to quickly answer product questions in the middle of a busy trade show, particularly if the product in question was an item that was currently not on special, or if they didn't know price or specs offhand.

After looking at several options, the team found Handshake Rep, Handshake's mobile order entry software, to be the best fit for their needs. In fact, Erickson had looked into Handshake back in 2011, noting the company as a pioneer in trade show order entry technology at a time where there were no options on the market.

Handshake Rep, a native mobile application, could be installed on reps' mobile devices and would work offline, giving them the freedom to have an engaging sales conversation at stores or trade shows, regardless of whether or not they had Internet access. It also included the search functionality that reps needed to answer product questions mid-appointment.

Most importantly, however, Handshake's order entry software was able to represent Milwaukee Tool's complex promotional pricing structure, a deal breaker for the business. According to Erickson, "When we realized that Handshake would be able to accommodate our promotions, that's what ultimately closed the deal."

Milwaukee Tool
was looking for a digital order entry solution with the **following requirements:**

1.

It had to be mobile.
Reps needed a tool that would give them freedom to walk a store or trade show booth, showcasing products and talking through promotions.

2.

It had to accommodate complex promotions.
The tool needed to be able to handle basic tiered pricing and discounts as well as more sophisticated promotional logic.

3.

It needed flexible search capabilities.
Reps needed to be able to search by part number or keyword to be able to quickly answer product questions mid-appointment.

Handshake's order entry software is built to accommodate the selling rules and promos common in B2B selling.

Handshake's order entry software is built to accommodate selling rules and promotional structures common in B2B selling, giving Milwaukee Tool the flexibility to set up promotions such as:

- Buy X, Get Free Goods
- Buy X Qty, Get a Promo Price
- Buy $, Get % Off
- Buy $, Get % Off Tiered Promo

This selling logic is set up ahead of appointments in the app, so that each time a rep writes an order with a customer, the correct promos and specials apply to the order automatically.

After Handshake: A More Efficient Sales Conversation

Since implementing Handshake, Milwaukee Tool has been able to dramatically improve the efficiency of their sales operation.

According to Erickson:

> "We're having a very efficient time with the buyer. We can get them pricing on the spot, and we can get the order in at the show. It's a tremendous increase in efficiency."

Reps now show up at sales appointments with customer-specific promotions loaded into the Handshake app, so they can spend less time looking up product information and specials, and more time selling strategically. This real-time data access has allowed Milwaukee Tool's sales reps to cut the time they previously spent writing orders in half.

Order accuracy has improved as well. Now that orders only need to be entered once, there are drastically fewer opportunities for errors.

Sales reps are also writing larger orders, attributed to the fact that Milwaukee Tool is now easier to do business with.

Milwaukee Tool uses Handshake's flexible platform to create promos like:

% Buy X, Get Free Goods

% Buy X Qty, Get a Promo Price

% Buy $, Get % Off

% Buy $, Get % Off Tiered Promo

We're having a very efficient time with the buyer. We can get them pricing on the spot, and we can get an order in at the show. It's a tremendous increase in efficiency.

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Director of Channel Marketing

Reps can now spend less time looking up product information and specials, and more time selling strategically.

Explains Erickson, "If someone can get the same products somewhere else, but it's easier to work with you, they'll choose you. Orders have definitely been larger, and Handshake has helped particularly as we are in a hyper-growth phase and gaining more market share."

If you're selling B2B with a highly promotional strategy and want to drive more efficiency in your sales operation with order entry software, contact Handshake today.

Email: info@handshake.com
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Milwaukee Tool's Order Writing Process, Post-Handshake:

Step: 1

Rep arrives at sales appointment with a digital catalog and customer-specific pricing and promotions loaded up on their iPad.

Step: 2

Rep writes the order on iPad, and it immediately syncs back to headquarters for fulfillment.