AccountMate®

Large Chipper Manufacturer Achieves Record Sales Aided by AccountMate CRM

Located in Remus, Michigan, Bandit Industries, Inc. is one of the largest manufacturers and leading suppliers of hand-fed brush and wood chippers, whole tree chippers, stump grinders, forestry mowers and waste reduction machines in the world.

Bandit wood chippers, recyclers, stump grinders and forestry mowers serve professionals in many industries including logging, tree care, land clearing, utility, recycling and municipalities. Founded in 1983 with only six employees, Bandit experienced explosive success after the launch of its first Brush Bandit Chipper. Today, Bandit employs over 400 people and operates a network of over 180 dealer locations worldwide. As the company grows, Bandit remains dedicated to providing innovative products, valuable services and support to their customers on the front line.

"We pride ourselves on the number of repeat customers who buy and rent our equipment," said Bandit Industries President Jerry Morey. "Listening to the ideas and suggestions of those who use our equipment has led to the development of many of our products. We consider our relationship with our customers a partnership. It's the success of our customers that has led to our success as a manufacturer."

The Challenge

Rapid Market Expansion and System Overhaul
Over the years, as demand for quality, durable, long lasting chippers and grinders increased, Bandit experienced rapid growth. Keeping pace with increased sales and manufacturing demands was challenging under the company's prior system, which allowed for casual record keeping.

While Bandit led the industry with innovation, its existing system did not have essential real-time information and consistent reporting accuracy on the financial management side of the company's operations. With two separate databases, inconsistent data entry often led to duplicate entries and multiple accounts. Viewing customer transactions from integrated departments such as sales, marketing, engineering, shipping, etc. became increasingly challenging as distribution requirements increased.

As a result, employees spent valuable time and human resources each month struggling to manage business operations that had become less efficient. It was clear the company had outgrown its existing system and required something new.

To support the growth of their business, Bandit specifically looked for a fully integrated accounting and customer relationship management (CRM) solution that would provide real-time automation, enhanced reporting capabilities, plus keep pace with increased sales demand. Merging multiple databases and completing the entire conversion without compromising billing, contact information or customer relations was essential.

The Solution

Enhanced System
Bandit turned to Innovative Software LLC, an Elite AccountMate Business Partner with a well-deserved reputation for providing enterprise business solutions. Following Innovative Software's recommendation Bandit implemented AccountMate's SQL accounting system and more recently AccountMate's CRM solution, *powered by* INFO*trac*, due to its scalability and open architecture to accommodate their growing business.

CRM provides real-time customer management. With quick access to current and historical information at their finger-tips, Bandit employees have an instant snapshot of current product, Bandit employees have an instant snapshot of current product, pricing and customer information. Perceptive reporting and analysis of pertinent, real time information provides insight into business operations and identifies growth opportunities.

CRM can schedule the next appropriate interaction, enabling exceptional account management and customer service. For example, CRM automatically schedules the next step via temperature settings, such as hot (30-day follow-up), warm (60- day follow-up) or luke warm (90-day follow-up), equipment demonstrations, and customer follow-up following a sale, machine issue and literature request. By streamlining the internal processes, increasing company-wide collaboration and sharing pertinent information, CRM creates a knowledgeable workforce ultimately improving customer relationship.

"CRM has provided us with answers and a medium to systematically evaluate statistics, ask questions, strategize and restructure processes", says Julie Severn, Bandit Office Computer System Manager. "By synchronizing sales, marketing and accounting, we've generated an environment to lead industry trends, eliminate wasted time and energy, and meet consumer needs with new technology, a growing product line and ensured quality."

Database Clean-Up & Synchronization
Prior to the AccountMate CRM installation, Bandit maintained two separate databases, which had been maintained independently for years: one database managing sales and marketing and the other database supporting key accounting functions. Using AccountMate CRM, Bandit was able to synchronize data, which eliminated duplicated entries and redundant accounts while increasing overall efficiency and productivity. Now, they have a real time CRM solution with every interaction entered for their prospects, customers and contacts in one centralized place.

"We've saved a tremendous amount of time by streamlining procedures and establishing improved employee and financial accountability", recalls Jamie Morey, Bandit Large Equipment Sales Coordinator. By centralizing all real-time, pertinent customer information in one place, any user can effectively support the customer.

Elimination of Manual Spreadsheets
With the AccountMate financials and CRM, Bandit was able to provide automated processes and functionality that eliminated the manual creation and management of their many spreadsheets. Previously, Bandit used hard copy claims and the database only captured basic information that was then stored in different programs. Today, pertinent warranty information is found in one centralized place. CRM captures basic information plus parts cost, copies of

invoices, attachments to claims, pictures, warranty validation dates and build sheets.

With AccountMate financials and CRM seamlessly integrated, Bandit employees can add part numbers to warranty claims and view invoices and credits in one program. To prevent claims from falling through the cracks, designated Bandit employees are automatically informed of open claims each day. By relaying the status of warranty claims, such as when claims are received and closed, with customers, Bandit employees dramatically improve customer satisfaction.

Comprehensive Reporting
AccountMate CRM offers many standard reports to monitor company productivity and performance. Using AccountMate to capture pertinent sales, marketing and accounting data enables company personnel to accurately monitor, measure and manage company performance instantly. CRM provides perceptive reporting and analysis and forecasting, identifies growth opportunities, and fosters team collaboration amongst company departments and divisions.

This allows Bandit employees to closely track warranty dollars, expenses incurrent for service work and ensuring that pending issues are closed in a timely manner. Company employees can also determine what trade shows are lucrative to attend based on sales, new prospects entered in the system and demographics per location. Using optical character recognition technology, employees can quickly scan, search and locate documents spanning the company's 30-year history alpha- numerically.

The Result

With the implementation of AccountMate, Bandit now has a system in place to properly and efficiently handle the company's exponential growth. The new system has been a contributing factor to Bandit's record-breaking sales, empowering the company to take full advantage of all available resources. Team members launched new business processes to find, attract and secure new clients and retain existing customers for repeat, returning business. With AccountMate, Bandit has a robust, integrated financial and CRM solution that will allow them to continue providing innovative products and valuable services for future decades.

About Innovative Software, LLC

Innovative Software, LLC is an AccountMate Elite Business Partner located in southeast Michigan, serving customers throughout the Midwest and East Coast. Specializing in providing solutions and services to small and mid-range distributors, manufacturers and food service organizations, Innovative Software provides consulting, customer support and custom development services. Innovative Software can be reached at **innovativesoftwarellc.com**.

About AccountMate

Founded in 1984, AccountMate develops and markets fully customizable business management software designed to meet the growing needs of small to medium-sized businesses. Systems range from single user versions to those that support over hundreds of users simultaneously. AccountMate software is available for local installations or cloud deployment. It is distributed exclusively through a worldwide channel of authorized solution providers. AccountMate can be reached at (800) 877-8896 or **www.accountmate.com**.