

“[Encore] is a reality check for companies with a mobile workforce because it tells you what is going on in the field. It has completely changed the way we manage our mobile team.”

- Jeff McCrary,
Vice President

Profile

Westlake Financial Services is a technology-based, privately held finance company that specializes in acquiring and servicing automotive retail installment contracts (automobile loans). Located in Southern California, Westlake has over 20 years of experience in auto financing with a network of over 10,000 car dealerships throughout the United States.

Challenges

Westlake relies on a very strong sales presence in the field to grow their contract accounts. Their mobile workforce is a vital component to the daily operations and required verification of field metrics. Westlake wanted to develop new sales expectations, policies, procedures, and compensation plans based on validated performance in the field. With over 200 sales representatives across the country, Westlake needed a proven MRM solution that had reliable GPS tracking and extensive reporting capabilities that grow their business.

Solution

Actsoft's [Encore] met and exceeded the expectations of Westlake. The reliable GPS Tracking feature, along with the easy-to-use dashboard, helped define new performance metrics for their mobile workforce. The ability to use BlackBerrys did not require a large initial investment or a lot of training for field service, allowing them to implement the new procedures quickly and easily.



Benefits

Encore's GPS Tracking allows Westlake to determine the exact number of appointments a sales rep should complete during the day. Using the breadcrumb history, they reviewed the length of time spent inside an account and changed the daily quota accordingly. "I can see if a representative is just stopping and throwing his business card on a desk, or if he is spending time talking about our products and services," said Mark Vazquez, senior vice president of sales and marketing. Westlake created a new service score based on the number of appointments, the time spent in an account, and the overall results.

After determining the new performance metrics, Westlake was able to manage perception in the field and set clear expectations for the sales team. Westlake uses landmarks and electronic timekeeping with a standard form to document account information, outcome, and next steps. Business intelligence tools compare one sales representative's daily activities to another, and displays the performance information in an easy-to-read graph or chart. This reporting feature was critical in determining accurate compensation plans for individual sales representatives. "[Encore] allowed us to validate and reward the hard workers versus the average reps. Implementing [it] has increased employee accountability and allows us to set clear expectations for the next performance evaluation," said Vazquez.

Wireless data collection has completely transformed the way Westlake manages their sales departments. "Tracker solves internal conflicts between inside and outside sales regarding ownership of accounts," said Vazquez. Using Encore's user history, Westlake is able to determine who made initial contact with specific accounts and when the sales pitch took place. "We had accusations of reps stealing each other's accounts. [Encore] was able to show me if the outside sales reps were at the account or not. The information is date- and time-stamped so there can be no argument."