

Enable Your Dealers to Quickly Create PDF Quotes

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Manufacturing Marketing

GROWING YOUR BUSINESS

MARKETING TO YOUR DISTRIBUTORS

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One question we hear regularly from manufacturers who work with distributors is, “Can you create a distributor login for us?”

THE ANSWER IS YES, you bet!

But, we can also do a whole lot more. In this week’s issue is a case study of the Dealer Quote tool Cre8d Design developed for European Home, a manufacturer and distributor of gas, electric, and wood modern fireplaces.

In a future issue, we’ll cover how to better market to your distributors.

– Dianna Huff, Editor and Rachel Cunliffe, Designer

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COVER:

The Element4 360 at Flour Bakery & Cafe, Cambridge, MA. European Home is the exclusive North American distributor for the Element4 line of modern fireplaces.

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European Home Enables Dealers to Create Quotes in PDF Format

Based in Middleton, MA, European Home is a manufacturer and distributor of modern gas, electric, and wood fireplaces, which they sell through a network of U.S. and Canadian dealers (aka retail fireplace shops).

The collection consists of three European brands from the UK, the Netherlands, and France, as well as the company's own line of indoor and outdoor units manufactured in New England.

For many years, European Home relied on a simple password protected "dealer login" that consisted of a link to Dropbox where dealers could find brochures, price lists, etc.

Although it worked well-enough, the European Home team wanted to upgrade to a more robust system that would house the information on the website backend.

"The challenge with the Dropbox link was that it took dealers off the website," says Cory John Ploessl, Marketing Manager.

In addition, Holly Markham, Founder and President, had been visiting with dealers on the West Coast. The dealer quote idea came about from ideas given to her in conversations with them.

The dealers wanted the capability to create quotes on the fly to give to their customers versus creating them

from scratch based on price lists.

The months-long process for creating the tool involved the following steps.

STEP #1: MAP OUT THE PROJECT, BUDGET, AND TEAM

The marketing team decided to add the new Dealer Quote tool as part of the website redesign project – the second redesign where European Home partnered with Rachel Cunliffe and Stephen Merriman of Cre8d Design.

“Dianna Huff initially brought on Cre8d when she oversaw the first redesign with Holly in 2014,” says Cory. “When Holly hired me fresh out of college in 2015, she had Dianna mentor me for the marketing role, something she did for two years – and which helped me considerably with regard to overseeing the second redesign on my own.”

Stephen, who has competed and placed in several international coding competitions, handles all the coding, development, training and bug fixing (to name a few things) for Cre8d Design. Due to his experience, he played the lead role in creating the new Dealer Quote tool.

STEP #2: CREATE A MOCK-UP

Although it sounds a little counter intuitive to start a complex project with something as simple as a quote mock-up, in this case, it was essential.

Cre8d needed to know the information European Home

wanted on the PDF quote in order to determine how they would code the logic system that would create the quote.

For example, the marketing team wanted the capability for dealers to add their logo and contact info.

This option was nixed for being too complex to create a user management system housing all the dealer information.

The team also had to decide on how to deal with issues such as sales tax. Says Cory, “Keeping track of sales tax for all the states involved too much work, so we elected to simply add a disclaimer to the quote that it didn’t include any applicable state or local taxes.”

STEP #3: CREATE THE PRODUCT LOGIC

For each fireplace unit, the marketing team had to map the various product options, such as:

- Brand
- Model
- Size
- Configuration
- Gas Type
- Venting
- Interiors
- Accessories

For some units, the options were straightforward (Figure 1). For others, it was complex.

Cory credits his marketing assistant, Lauren Piandes, for organizing all the product logic, which was a huge project by itself.

STEP #4: HOLD TRAINING CALLS

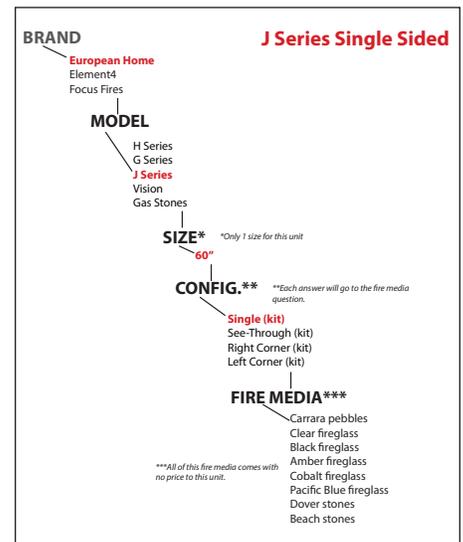


Figure 1: The product option logic for one of European Home’s fireplace units.

In order to reduce costs, European Home elected to have Stephen train the marketing team on how to create the code that would produce the PDF quotes.

To keep things relatively easy, Stephen first created the structure and worked through the more complex coding issues. He also figured out a way for the team to copy and paste pieces of code from one product model to another.

Then, through Zoom screenshare calls and Basecamp (a project management system), he taught the marketing team how to create the code themselves.

According to Cory, when he and his team first encountered the complexity of the project, they were overwhelmed.

“We had to learn everything, from how to FTP to figuring out why, when we coded something,

“What is really awesome about the new tool is that a dealer can be talking to a customer who is looking at a brochure and saying, ‘I want this option, I want that option.’ As the customer talks, the dealer simply clicks buttons.”

The screenshot shows a web form with three sections: 'Choose Brand', 'Choose Model', and 'Choose Size'. Each section has radio buttons for different options. 'European Home' is selected under Brand, 'H Series' under Model, and '42"' under Size. A note at the bottom states: 'All sizes and configurations include: electronic ignition, battery back-up, remote control, Satin Black interior and choice of complementary fire media.'

Figure 2: A portion of the Dealer Quote tool showing how dealers click for each option.

the end result wasn't right. Sometimes it was simply a matter of a missing 'end bracket.' Other times, it was something only Stephen could figure out.

“But, he worked patiently with us and was always available to hop on a Zoom call and walk us through it.”

STEP #5: GET FEEDBACK

Once the Dealer Quote tool was ready to go live, Cory and his team demonstrated it with select dealers to solicit feedback.

Based on this feedback, the team then made final tweaks.

RESULT: HAPPY DEALERS, IMPROVED PROCESSES

“What is really awesome about the new tool,” says Cory, “is that a dealer can be talking to a customer who is looking at a brochure and saying, ‘I want this option, I want that option.’ As the customer talks, the dealer simply clicks buttons.” (Figure 2)

Once the customer decides on

everything, the dealer then clicks a final button and is able to print out a beautifully formatted PDF with all the options and pricing.

The one drawback is that the quote doesn't include labor or installation costs, which are unique to each dealer. The dealer adds them separately.

The other added benefit is that Lauren, with her new-found coding capability, can easily make changes any time a product specification changes as well as add new products. “Stephen is just an email away if she runs into any issues,” says Cory.

Feedback from the dealers has been positive. “It has definitely reduced calls and emails for customer service from dealers,” says Cory. 📧

European Home offers beautifully designed gas, wood, and electric modern fireplaces. Visit the website: www.europeanhome.com

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Distributor Quote Tool Project Considerations

If you work with distributors and have been considering a similar tool for your website, you'll want to take into consideration the following:

- **Budget** – Creating a custom tool like this involves extensive complex coding. You can opt to have a programmer do all the work for you or have the programmer train you.
- **Timeframe** – A project like this can take 3-6 months, as each phase may require considerable time. Do not rush the process for an artificial launch date.
- **Features** – Determine the extent that dealers can customize the quotes. For example: tiered discounts, shipping, sales tax, and custom costs formula. Do you need dealers to see past quotes generated? Etc.
- **Integrations** – Do you need to have the tool integrate with other tools, such as an e-commerce or user management system? This can considerably add to the complexity and cost of the project.
- **Staff resources** – A project like this takes time and requires someone on your team to properly manage it. If you're the owner of the company, consider delegating the project.

The more you carefully plan out your project's requirements, the easier it is for your web design team to quote you costs and timeframe as well as make recommendations.

Question of the Week

What's a User Management System?

If your website is built in WordPress, you already know what is a User Management System because WordPress has a simple one built in. The people who make updates to your website, such as you, your designer or marketing consultant, will have their own password-protected login to your website backend.

For creating a password-protected distributor login, you need a separate and more advanced user management system for distributors to be able to see and edit information only for their account.

Before adding a user management system, determine what you want users to be able to do and

not be able to do, e.g:

- Change their password
- Upload their logo
- Add their address
- Add formula for labor and installation costs
- Specify taxes
- Create logins for other staff in their dealership
- See all past quotes

Once you have a clear idea of your needs, talk to your web design team to develop the system for you.

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ABOUT DIANNA HUFF AND RACHEL CUNLIFFE

Dianna Huff, [Huff Industrial Marketing](#), and Rachel Cunliffe, [cre8d design](#), provide ongoing marketing and design to manufacturing clients across the U.S.

Our process is seamless and efficient and is designed to **strategically create a website and follow-on marketing that gets you sales**. We're easy to work with – and friendly and charming, too.

