

Equipment Depot & UCC Filings

Raising a forklift dealer's business to new heights!

Challenge

Equipment Depot, a Texas based forklift and material handling products dealer was expanding in the Midwest. This growth required implementation of a new program for routing and managing leads at the appropriate sales office. This included managing UCC lift truck filings at the territory level. Equipment Depot sought an easy-to-use program to manage its sales opportunities and a support team to handle processing.



Solution

Ultimate Lead Systems tailored its CRM program to capture UCC filings assigning them automatically to each sales territory. It also created a customized dashboard to identify the "Top 5" fleet owners in each territory by number of lift trucks owned and by dollar value. The dashboard also tracked market share by brand. The new corporate dashboard presented "global" totals. Pre-defined queries were also created to make it easy for users to find lift trucks coming off of 3-5 years leases by make and model. Filing data was made easy to download into Excel. ULS created automated processes to capture new filings and to keep the data up-to-date.



Results

With the new program in place, Equipment Depot's sales team can now identify and manage more sales opportunities by territory, solicit more parts and service contracts from owners of competing brands, track new sales results and lead conversions as well as growing market share by territory. Users can now easily identify owners of lift trucks by make, model, category, class, sales vs. leases, as well as fleet size and dollar value.

ULS's CRM program was also be tailored to manage sales opportunities from 123Forklift, BuyerZone and other external lead sources.