

M Rep's Digital



What's mine is yours.

Sharing Digital Best Practices Amongst
ERA Members



Objective

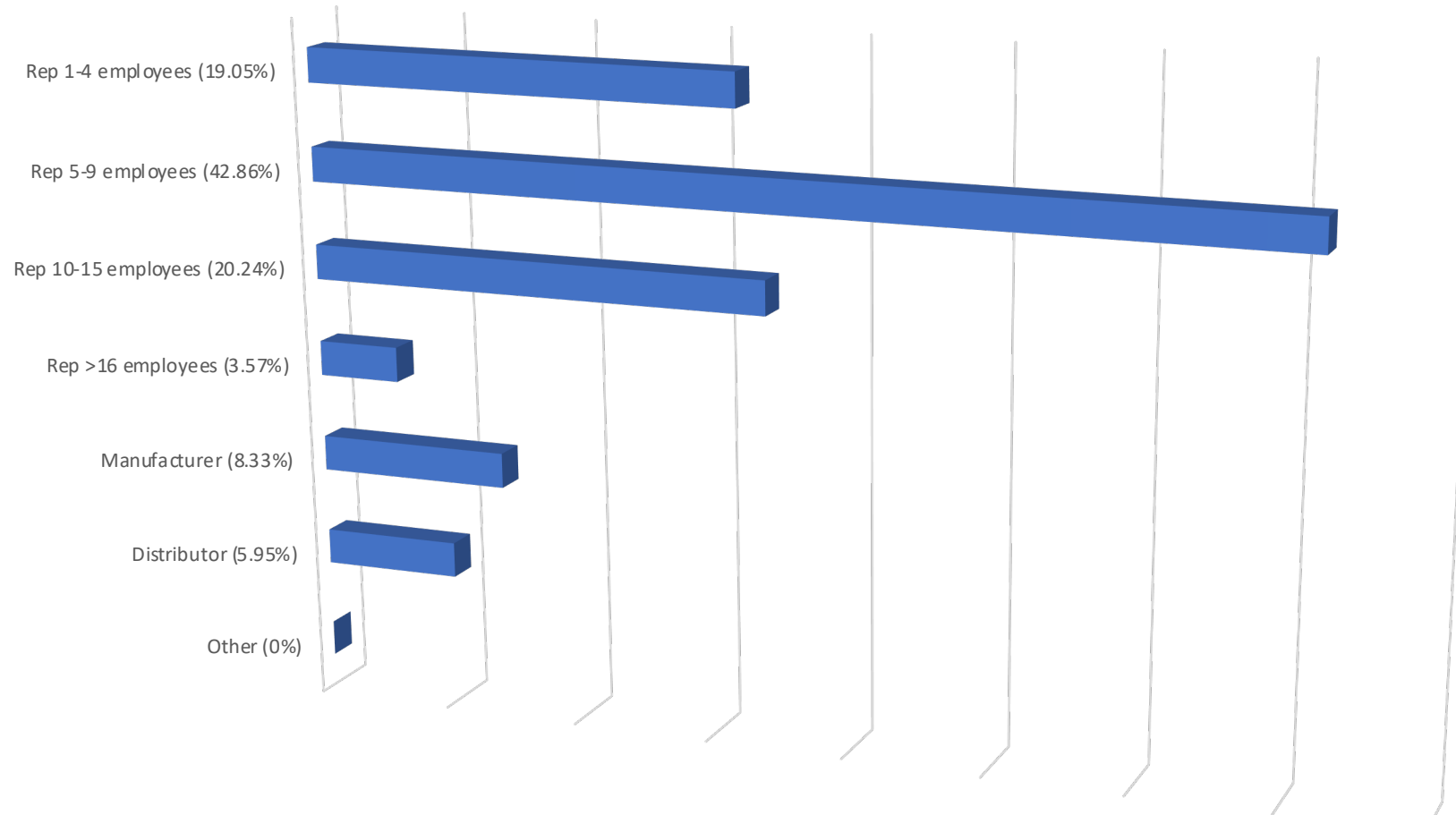


- Back By Popular Demand
 - History Lesson:
 - 2015 developed idea at the bar
 - 2016 First Technology Swap Shop
 - 2017 Follow Up
 - Passing of Time Provide us with New Insight – What has Changed?
 - We Are Not Experts
 - Re-Presenting Survey Results How Fellow ERA Members Using Digital Tools To Improve How You Do Your Jobs
 - Facilitate Interactive Conversation
- 7 Primary Areas of Focus
 - CRM
 - Digital Networking & Social Media
 - Digital Content
 - Digital Communications
 - Internal & External
 - File Sharing
 - Data Processing & Analytics
 - Others



Define Your Organization

Organization Type & Size



more respondents and more balanced

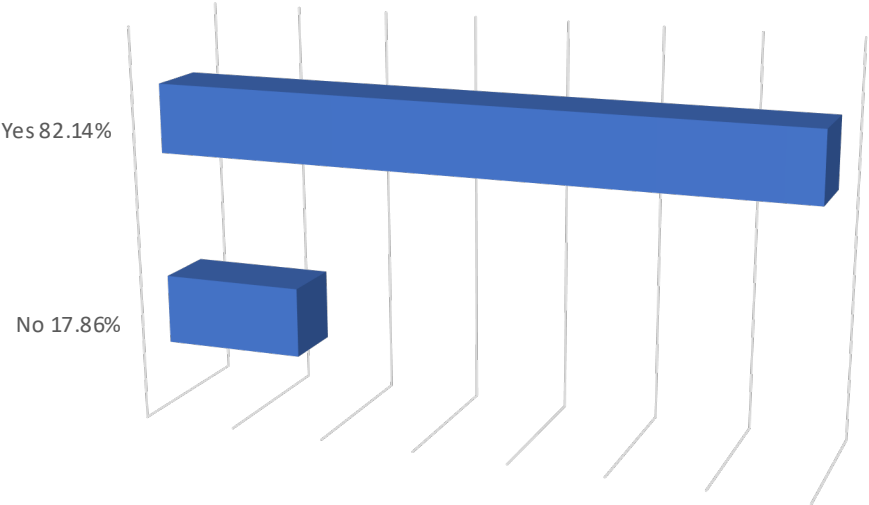


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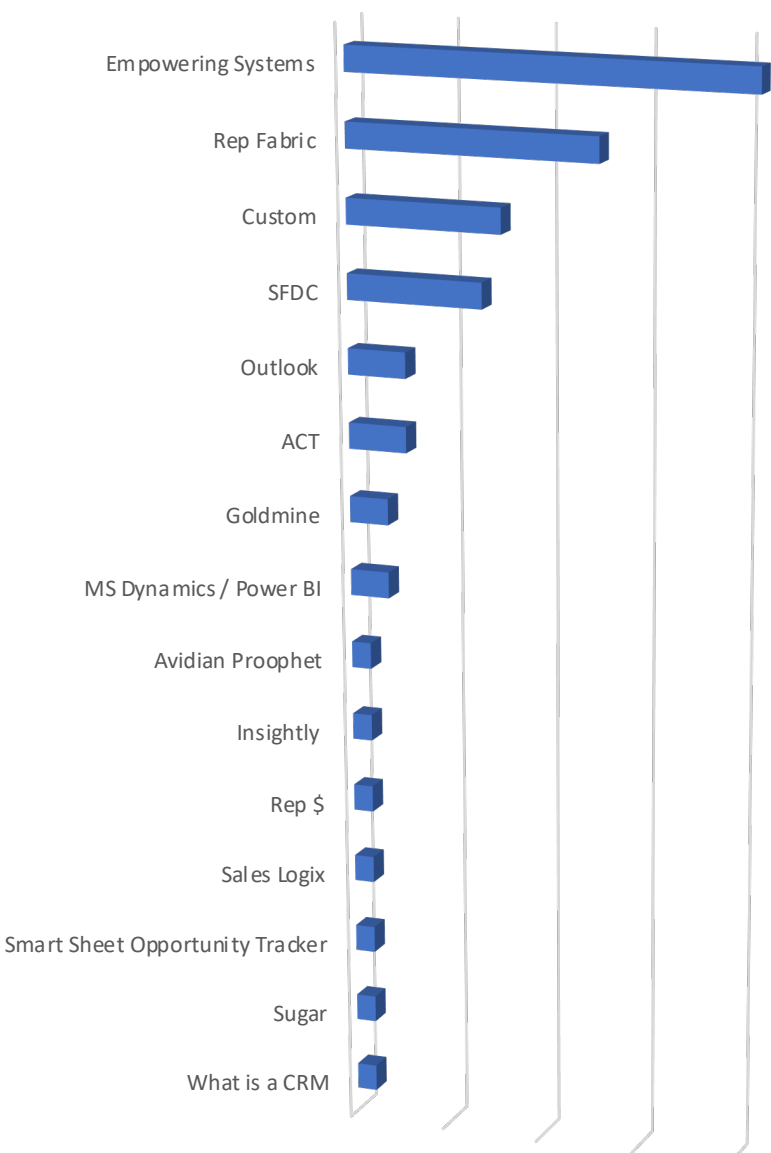


CRM

Are You Using?



What Are You Using?



How Are You Using Differently 3-5 yrs?

Still too much redundancy.

More functionality than CRM. Previously used only for running commissions. Now using for reporting, scheduling, analytics, opportunities, splits, design registrations, data mining, value add opportunities, ETC.

More web based less Lotus Notes. Utilizing more Cloud tools and mobile app.

Combined with MS Exchange and Outlook

More focused on cleaning up old contacts

Continuing to evolve in positive ways

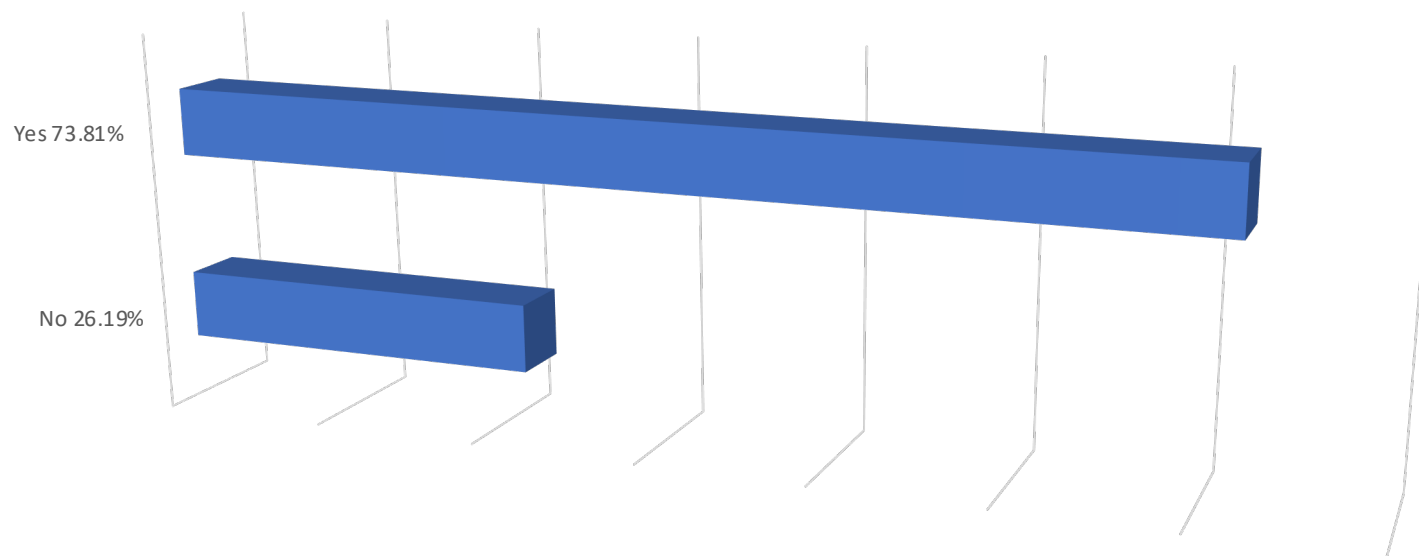


What's mine is yours.



Digital Networking & Social Media

Are You Using Differently 3-5 years ago?

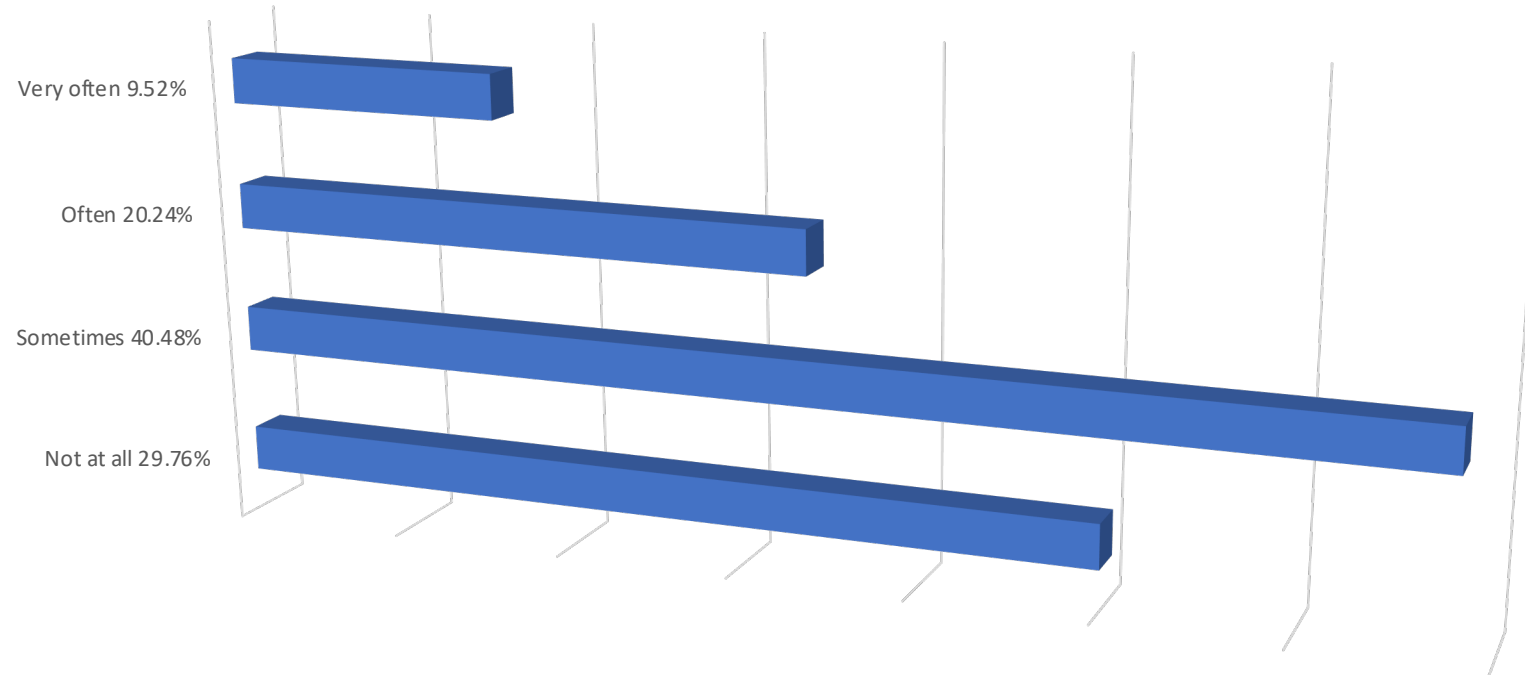


How Are You Using Differently 3-5 yrs?

Linkedin, Linkedin, Linkedin	Less Liking - More Commenting and Sharing
More Following Customers, Principals, Distributors	Resharing Content – mostly from manufacturers
Sales Navigator – More Research & Lead Generation	Making Linkedin a Habint
Encourage Employees to have Professional Profiles and be Active	Created Professional Linkedin Page for Company and Actively Using
Google Analytics	Blogging
Using to Improve Company Brand	More Promotion of Associations – ERA, ECIA, WE, EDS, etc.
Digital & Social Media is key to any Marketing Campaign	Still Need to Improve
Recruitment	

Digital Content

Are you creating your own digital content, and if so explain?



What's mine is yours.



How Are You Using Differently 3-5 yrs?

Not Enough Creation – More Replication

Content: NPI, Data Sheets, White Papers, App Notes, Events, Announcements, New, Testimonials, etc.

Redesigned Web Page to Share Content

Integral Part of Branding & Marketing Strategy

Delivery: Social Media, Web Pages, Email, Video, Blogs, etc.

Using Content as Tool for Engaging Customers – Bait on the Hook



Digital Communication

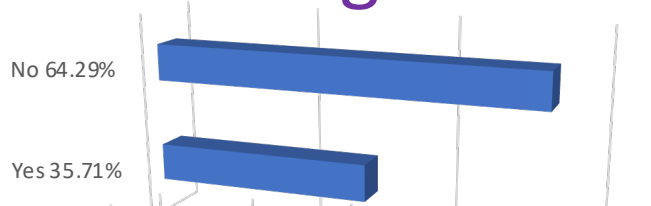


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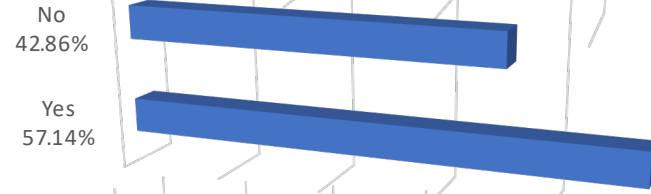


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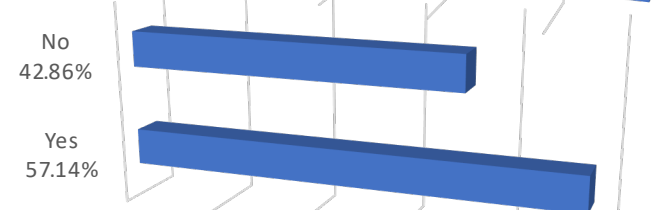
Internally Email
differently 3-5
years ago?



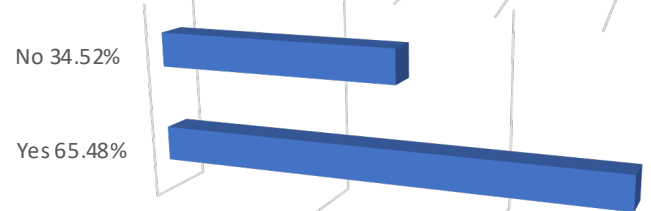
Externally Email
differently 3-5
years ago?



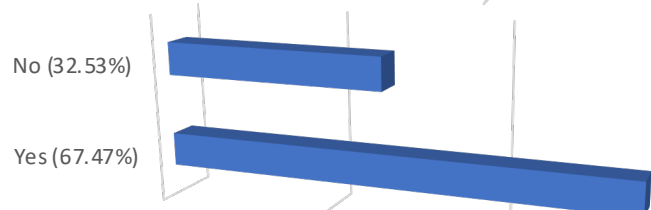
Internally
Voice/Video
differently 3-5
years ago?



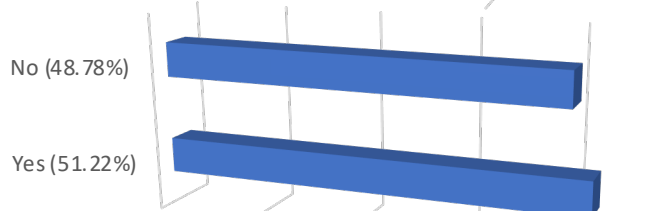
Externally
Voice/Video
differently 3-5
years ago?



Internally
Messaging
differently 3-5
years ago?



Externally
Messaging
differently 3-5
years ago?



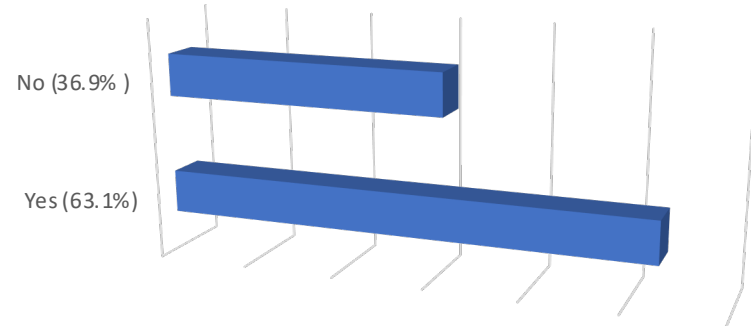
Internal Email	External Voice/Video
TEAMS, TEAMS, TEAMS	Much more with customers and principals
Using TEAMS in conjunction with CRM	Training
"Unsure how, but feels like we evolved"	The frequency of these meetings has increased
Using Less – Replaced with Other Tools	More TEAMS – Less others
External Email	Internal Messaging
Now #1 way of Getting Appointments	FACETIME from Factory Floor
More of it - too much	Internal Messaging
Improved Best Practices: strategic, be direct and to the point, write professionally, improved subject line	More Efficient than Email
Constant Contact - Active Campaign	Good for Urgent Matters
Still a Worthy Means of Product Marketing	TEAMS Chat
Too Removed from Customer - Good for Sharing Documents, but prefer to Call	Net Suite Messaging
Using Less – Replaced with Other Tools – Texting Customers	TEAMS is too complex for a small organization like ours. Email and texting is just fine.
External TEAMS with Guest Feature	Platforms – Sametime, Teams Up, Slack, What's App, Yammer
Internal Voice/Video	External Messaging
Is very cost effective and efficient	TEXTING more accepted with customers
Using much more scree sharing	Text is the only way to reach some people
Converted to IP phone systems helps to support more Digital Meetings	No Linkedin Text Responses
Full Video Staff Meetings	
Platforms - Skype, TEAMS, Goto Meeting, Webx, Zoom, Facetime	
Status of Skype – MS converting with TEAMS	

File Sharing

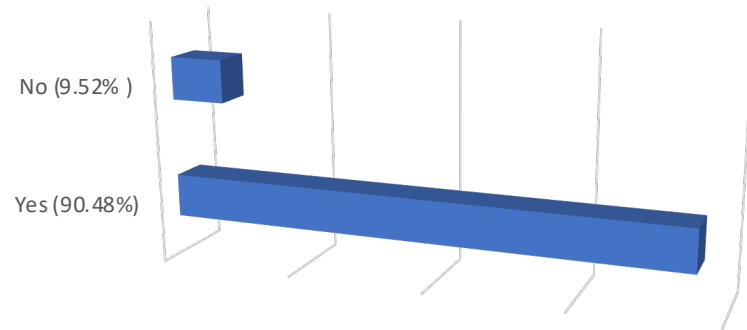


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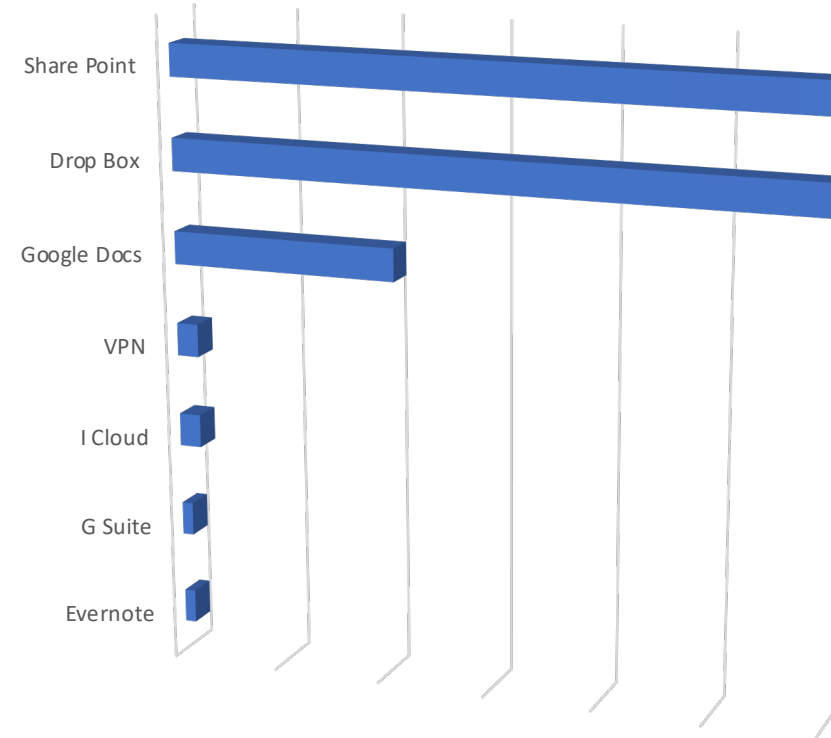
Were You Using?



Are You Using?



What Are You Using?



How Are You Using Differently 3-5 yrs?

Platforms – MS365: (SharePoint, One Drive, TEAMS), Dropbox, Google Docs, G Suite, I Cloud Drive, Part of CRM, Evernote

“Replaced VPN with SharePoint and we love it”

Great for Large Files

Digital Library – files for Manufacturers, Distributors, Customers that include data sheets, prints, quotes, white papers, etc.

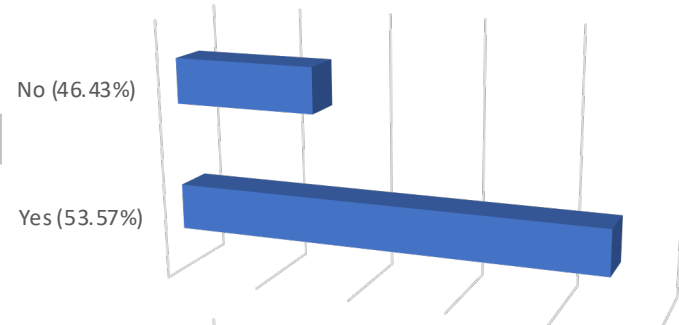


Data Analytics

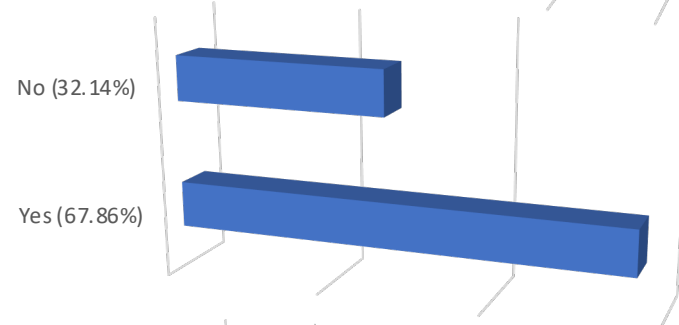


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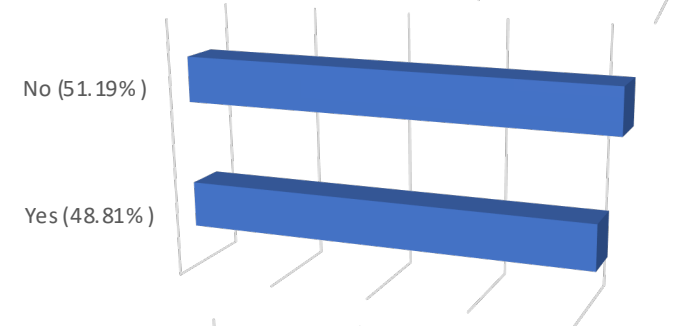
Processing Data differently 3-5 years ago?



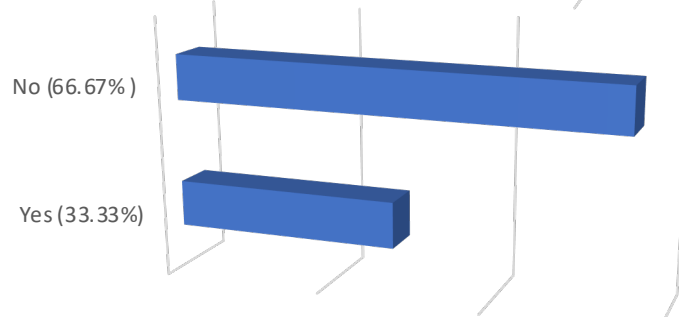
Sources for Receiving Data differently 3-5 years ago?



Using Tools differently 3-5 years ago?



Developed Best Practices 3-5 years ago?



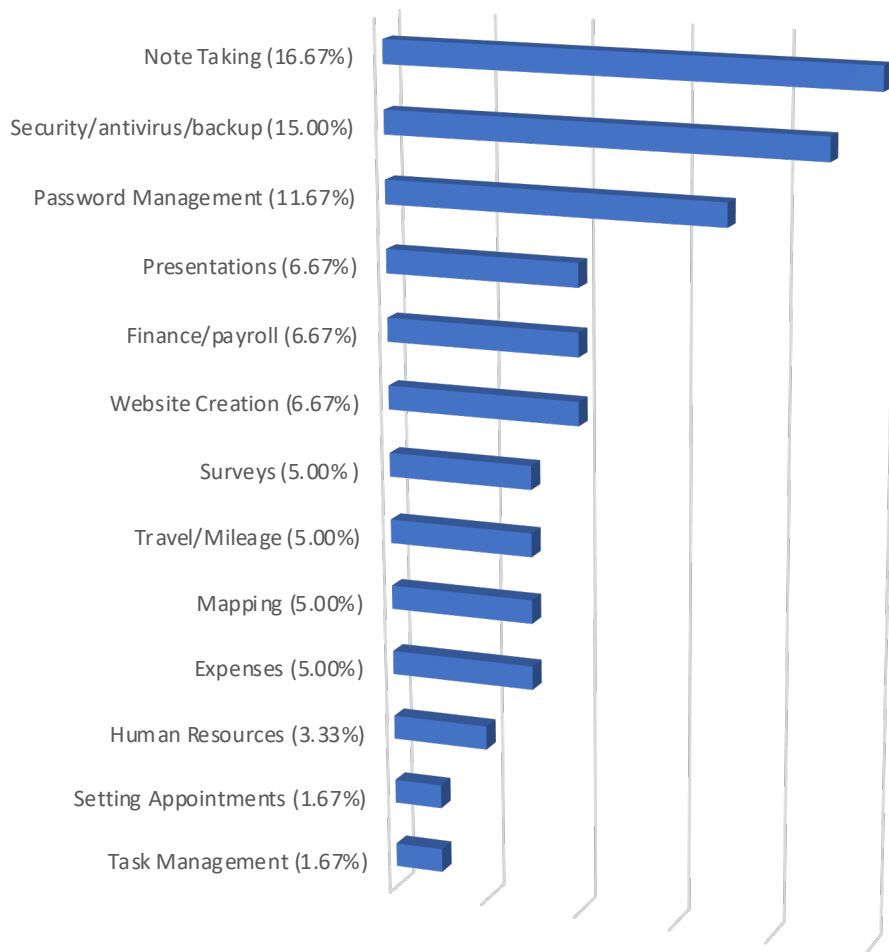
Processing Data Differently	Using Tools differently
Much More of It – Identifying Trends	Similar to Processing - Using Existing Platforms: Differently – CRM, Pivot Tables, ERP
Importing is More Automated, Less Data Entry	Similar to Processing - Using New Platforms: Dashboards, Power BI
Incorporated GTD Principals – Get Things Done, David Allen	Unlike Sources – A lot of FTB Reports
Using Existing Platforms More Frequently & Differently – CRM, Pivot Tables, ERP	Tableau Highly Recommended
Using New Platforms – Dashboards, Power BI	Developed Best Practices
“Not Yet – But Plans Are Being Developed”	Analyzing More Frequently and Incorporated it into Operations
Sources for Receiving Data Differently	Sharing and Reviewing More Frequently with Sales Team as part of Sales Plan
Linkedin, Linkedin, Linkedin	Sharing More Frequently with Manufacturers and Distributors
Other Sources – Hoovers SIC, Associations (ERA, ECIA)	Creating Own FTB Reports
Only 1 Respondent for First Time Buy Reports	



Additional Digital Tools



What other Digital Tools are you used more over the past 3-5 years?



Note Taking: One Note, Dictate notes using Repfabric Activity Journal, Microsoft Surface Pro, Rocketbook, Tablets w/ handwriting recognition
Security: Kasperskey, Malwarebytes
Password Management: Keyper, Dashlane, LastPass, 1Password, RoboForm
Finance / Payroll: Paychex, Paylocity, Gusto, QuickBooks
Website Creation: WordPress
Travel / Mileage: MileIQ, MileBug
Expenses: Expensify, ExpenseWire, Quickbooks, Concur
Mapping: Rep Fabric
Surveys: Constant Contact, Survey Monkey
HR: Gusto, Purely HR,
Email Marketing: Hubspot, Constant Contact
Scheduling: Team Up Calendars, Doodle Poll,



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