CAVALLO | **STEINER**

STEINER TRACTOR PARTS

LENNON, MI | STEINERTRACTOR.COM

The Company

Founded in 1977 when Dave Steiner built his first new part for old tractors, Steiner Tractor Parts has been serving tractor enthusiasts for over 40 years. With a warehouse, storefront, and corporate office, Steiner has grown significantly while maintaining its family-owned roots. A Cavallo customer since 2012, Steiner continues to expand its inventory and increase quality while meeting customer demands.

The Challenge

Using Microsoft Dynamics GP and manual tracking for its order and customer management left Steiner without the ease of use and potential for growth that it needed. "We printed everything, we pushed paper. If you can believe this, every order in our office was taken on paper," said Elizabeth Whiting, describing the tedious manual process that had been the norm at Steiner. Whiting explained how they also found reporting and customer lookups surprisingly difficult in GP. Steiner needed solutions to streamline order processing, speed reporting, and simplify onboarding.

The Solution

Since becoming a SalesPad customer in 2012, Steiner has seen tremendous growth. With powerful automation from SalesPad, Steiner can process documents in large batches. With 800 orders daily, Whiting said that, "Dealing with those on an individual basis inside of GP was a nightmare." Using automated

"But it's not one big thing necessarily. It's the addition of every one of those little pieces that makes everybody's life easier every day."

Elizabeth Whiting, Steiner Tractor Parts

workflows in SalesPad, they've created an ease-of-use in their business processes. Whiting explained that, "There's no way we could have grown to this size without having a tool that helps us to automate processes."

Faster Reporting

Not only has Steiner been impressed with SalesPad's workflow automations, the company is also making great use of the reporting features available in SalesPad. By using quick reports on sales documents, they have begun upselling to their wholesale customers based on quantity breaks. While on the phone with customers, Steiner CSRs can quickly run a report telling them which items are on the order and in turn, upsell the customer on a better price for a larger quantity.

Steiner also utilizes quick reports at a customer level. For its annual fall promotion, Steiner offers a discount when customers reach a particular dollar amount. With SalesPad, CSRs run reports on customer cards that show the items that a customer is most likely to stock up on. Using this information, the CSR can offer a better promotional price if the customer adds more of the items that they tend to sell anyway.

Simplified Onboarding

Steiner has prioritized getting its employees up to speed on SalesPad. "Being able to onboard an employee quickly is really important," Whiting said, "and having all employees using the same software is also really important." With the simple, intuitive UI available in SalesPad, Whiting said they complete new employee training much faster than in the past.

With software designed to make life easier, Steiner can maximize its competitiveness in the market and reach business goals, rather than struggling to keep up with the flow of work.

> "We have all different types of documents and types of customers and we use the workflow to differentiate and make those go through our process as fast as possible. Right now we're shipping order sthe same day that they come in. That's really only possible through using automated tools, so that we're not touching every order with multiple people."
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> **Elizabeth Whiting, Steiner Tractor Parts**

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