

Workflow Simplified

Dealerships embrace document management/ECM

by: Brent Hoskins, Office Technology Magazine

Looking for a way to further diversify your dealership's portfolio? If so, perhaps it is time to take another look at offering a document management/enterprise content management (ECM) solution.

To provide you with a better view into the opportunity, below are profiles of three dealerships focused on their document management/ECM offerings. Perhaps their comments will provide you with some welcomed insight and guidance.

Metro Sales Inc.

With approximately 260 employees, Metro Sales Inc. is the largest Ricoh-authorized dealership in the United States; Ricoh is the only imaging line the dealership carries. With these thoughts in mind, one would assume that DocuWare — acquired by Ricoh in 2019 — was the automatic choice for the dealership when the decision was made in 2021 to offer a document management solution.

“No, not really; we had other options,” says Dan Tuohy, president and CEO of the Burnsville, Minnesota-based dealership, which has seven additional locations in the state and another in North Dakota. The dealership's footprint also includes western Wisconsin, northern Iowa and South Dakota. “When we signed on with DocuWare, Ricoh had very little influence or connectivity with the company,” he says. “They later became more collaborative, but at the time they were truly distant cousins.”

So why did Metro Sales take on DocuWare? Tuohy states it simply: “DocuWare was the best choice.” That choice has paid off. By 2022, Metro Sales was among DocuWare's top five dealer partners. “We did \$700,000 our first year and should do \$1 million this year in new business,” he says. “So, \$700,000 last year will renew this year, and then this year we're looking at another \$1 million. I anticipate this being a \$4 million to \$5 million business in the next four or five years.”

Wouldn't any dealership of Metro Sales' size automatically achieve great success with DocuWare? No, Tuohy says. “If a



dealership signs on but then essentially just 'lets it sit on the shelf,' it will die,” he says. “Instead, you need the right compensation and incentives, and you need weekly funnel reviews.”

What does that look like at Metro Sales? Tuohy shares some insight. “We've got 70 sales reps in our 100%-straight-commission sales force,” he says. “We pay more on net new. We said: ‘Any DocuWare that you sell to current customers will be considered net new.’ We also made DocuWare part of our

President's Club trip. Every sales rep had to sell one DocuWare [implementation] to qualify for the trip.”

The 70 sales reps have access to an in-house team poised to provide guidance and support, Tuohy adds. That is, Metro Sales has a team of five advanced technology specialists and four sales support personnel to participate in the DocuWare selling process and manage implementation.

In the form of advice to other dealers, Mike Franczyk, software and technology support selling manager at Metro Sales, notes that the support team has transformed since its inception. “Make sure your engineering [at Metro Sales, advanced technology specialists] and sales specialists collaborate with each other and work closely together,” he says. “When we first started this, the groups were siloed from one another. What we learned was sales would get its part done and then would go to service. Service would then ask such questions as: ‘What about these questions that needed to be answered? What was the thought process here?’ What we ended up doing was merging the two teams together so that now they sit right next to each other. Today, we have a very agile team. We run into fewer ‘hiccups’ along the way with all team members being able to communicate quickly and effectively with each other.”

Tuohy says “there is no other ‘stickier’ part of our business” than document management. “I mean, we also do managed network services, but you can remove that in 30 days,” he says. “However, if I pulled DocuWare out of our organization [yes, the product is used internally at Metro

Sales], it would be a challenge. We are now deeper and wider in our customers because we've changed their whole work environments."

DocuWare is one of the dealership's four pillars "right up there with managed network services," Tuohy says. "We've got a managed office approach. That's where you need to be as a dealer; look within the four walls of your customers and understand how to capture every technology dollar spent."

PERRY proTECH

John Swalwell had a unique opportunity to influence his future prior to joining PERRY proTECH, based in Lima, Ohio, where he serves as director of operations. Before he joined the 250-employee, eight-location (across northwest Ohio, northeast Indiana and southern Michigan) dealership nearly 16 years ago, he worked at Kyocera and supported Perry Corp., now PERRY proTECH. "Kyocera didn't have its own document management solution," he says. "In the day, it was all about which vendor gave the best support in your region. Well, Prism Software gave great support in the Midwest region. So, as the solutions manager for Kyocera for that region, I would recommend Prism's products a lot."

PERRY proTECH heeded Swalwell's advice and began selling Prism. "We started with DocRecord [Prism's ECM platform] and DocForm [automating business communications] in 2006," Swalwell says. "We had a lot of manufacturing clients with a need to do away with line printers or archiving transactional printing from older host environments. DocForm has the ability to capture those print streams, overlay them on electronic forms and archive everything into DocRecord with appropriate tags based on all of the metadata. It was just a fantastic, relatively turnkey solution for those clients."

Prism's products are always improving, Swalwell says. "They are really a proactive partner; they continue to grow their product line," he says. "That is key for us. When you are successful with a given product and have a comfort level with the vendor, and all of a sudden there are four or five other things added that look intriguing, it's so easy for us to expand with the product. That's what Prism has done over the years; they continue to add features."

The fondness for Prism reached new heights around 2014 when the company "changed the entire structure of its maintenance plans; that really catapulted our Prism sales," Swalwell says, citing the move from an annual renewal only

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to a five-year-plan option, paid upfront but providing the customer with a 40% savings. "That makes a lot of sense for our customers and it helps to ensure our revenue stream long term. Today, there is no 'back and forth' with the customer about annual renewals, which is always a good thing."

Even with all of the praise for Prism, "it's not about going out and saying: 'Let's sell

some Prism today,'" Swalwell says. "Instead, it is: 'Let's find a client who has a need.'" That begins with a simple question, he says. "When a rep knocks on a door and asks, 'Who is in charge of your copiers?,' that rep is the third person asking the question that month. Instead, the technology sales executive needs to walk in and ask: 'Who's in charge of your content management and business process improvement?'"

Today, there is "so much opportunity" for document management/ECM, because the need is intuitive and widespread, Swalwell says. "Anyone who uses paper or email-based workflows knows that they are time consuming and 'break' easily," he says. "Plus, we also now have the situation where knowledge workers want to work from home ... We have been leveraging that whole digital transformation the media is playing up, which is good for us."

Swalwell shares advice for others only now considering offering document management/ECM. "Stick with it and leverage your vendor," he says. "It is very common to see a dealer dive into this, hire a specialist and, six months later, because \$250,000 worth of software was not sold, kill the whole program and walk away from it."

Today, it is "much easier for dealers to get into this, but they have to stick with it," Swalwell says. "It will only be a matter of time before reps are really, truly successful at identifying the opportunities ... We want to get our piece of that pie, because if we don't sell it to the customer, somebody else will. We're currently averaging two to four installations a month. We anticipate that will grow in the future."

TGI Office Automation

Nearly 60 years ago, what is today TGI Office Automation was established in the founder's garage. The product line: Paper and office supplies. Today, the company, based in Brooklyn, New York — with Ricoh, Toshiba and HP as its primary office imaging product lines, and offering a broad range of other products and services, including Lexmark printers and MFPs — has about 500 employees working from nine

locations in New York, New Jersey and Florida.

“TGI has migrated from office supplies to office equipment to office technology to office automation and, now, to office optimization — it’s been this natural progression,” says Brian Sampietro, CIO. “Like a lot of dealers, what we’ve found over the years is that whether it’s in print, print security, ECM, automation or integration, most

of our clients don’t have that natural skill set because they only see their environments where we see hundreds or thousands of different but similar situations where we can take what we learn in one case and leverage that to help many other clients with similar problems.”

That has been particularly true with ECM — “the business automation side” — Sampietro says. “Anytime there is a repeatable process, you get better at [implementing] it as time goes on, and you are able to make money at it,” he says. “That’s been a huge benefit to us.”

How huge? “If we look at regular commercial business — so, not including our major accounts — I would say that ECM is involved in half of our deals today and probably contributes between 20% to 30% of our revenue,” Sampietro says. One of the ECM platforms TGI leads with is M-Files. “2020 was a tough year because businesses were not operational. But once they got back to where they were operational and realized the world had changed [with the growing demand for remote access to company information], we had people knocking on our door left and right. 2021 was a great year for ECM, 2022 just continued to grow and we have high hopes for 2023.”

Why M-Files? “Over the years, we had gone very wide, offering 10 different [document management/ECM] products,” Sampietro says. “However, a few years ago, we looked at the different systems out there and decided to reach out

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to M-Files because we found that it had a tight integration with the Windows operating system. That way, people who are used to accessing documents and working on them in a ‘native space’ don’t have to learn a new piece of software. They can simply go into their M: drive [the M-Files integration into Windows Explorer], open it up, start working on their document, modify it, save it and

have the M-Files capability behind the scenes manage it and make sure the indexing is updated properly and the document is sharable so that they can collaborate on it.”

Sampietro’s praise for M-Files extends to the level of support it offers to TGI as well. “They are constantly sending out new documents for marketing and battle cards you can use to enhance your sales tactics,” he says. “They also offer to assist with demos. Plus, they give us leads in our area. We won a pretty large account that way where M-Files also worked with us to configure a complex workflow.”

In their interactions with customers, TGI general sales reps and in-house ECM specialists do not convince prospects by talking about the M-Files product by name or listing its features, Sampietro says. “They don’t want to hear about all of the capabilities,” he says. “They just want to know what is going to make their problem go away.”

Sampietro emphasizes that the key to success in solving customers’ problems with ECM is understanding their business processes. “You cannot sell ECM if you do not truly and deeply understand your customer’s business processes,” he says. “If you don’t understand their business, there is no conversation to be had.” ■

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