



## Equinox Louvered Roof Case Study

“We need to manage opportunities better by getting sales leads to our partners and vice versa.”



## Background

Equinox Louvered Roof is the premier supplier of exclusive shade structures for luxury residential and architectural design applications. Their product line is highly customizable and sold primarily through dealers, distributors, and home centers worldwide. Equinox was in the process of re-designing their corporate website and were looking to use that as a tool to generate leads that could be delivered directly to their network of dealers to help gain mindshare and close more business.

## Challenge

Equinox was tasked with aggressive growth targets through their existing dealers and needed a way to effectively onboard new dealers in areas with limited coverage. Delivering updated marketing and sales material was always problematic due to the number of manual processes involved. Furthermore, Equinox territory managers had a difficult time keeping track of sales opportunities being worked on at the dealer level as a result of poor communication channels. Dealers were growing frustrated in the lack of sales support and Equinox managers were worrying about not being able to meet their sales targets. Something had to give.

As Equinox embarked on their website redesign, they decided they wanted to improve the ability for end customers to locate and contact an Equinox dealer in their area. In order for Equinox sales managers to capitalize on these leads and help their local dealers close more business, it became evident that a process needed to be put in place that allowed the leads from their website to automatically be assigned to the right dealer. This process would provide the Equinox team with improved visibility into their lead pipeline while giving their dealers access to what they wanted most: highly qualified sales leads!

## Solution

The LogicBay project management and implementation team collaborated with the Equinox web development team to produce and test the JavaScript that would be enable an automated lead flow from the individual dealer pages on the website to the Equinox Dealer Portal. This integration allowed real-time data transfer into the Dealer Portal, which recorded a new lead and triggered an email notification to the appropriate dealer and the Equinox territory manager. A process that normally took several hours - or even days – was reduced to mere seconds.

## Result

In addition to the automated delivery of qualified leads down to the dealer level, Equinox was able to engage their dealers with updated sales and marketing material and a formal process to register the leads that they were able to create at the local level. Equinox can also deliver leads that they generate through regional or national tradeshow down to the dealer level though a bulk upload process that also uniquely identifies the appropriate dealer and follows the same notification process. A bi-directional

lead management capability that did not exist prior to this solution has given Equinox greater accuracy in their forecasting and has helped them close more business through timely follow-up and guided sales support.

## About Us

LogicBay has been helping companies achieve breakthrough performance from their sales channels by applying proven best practices combined with Partner Relationship Management (PRM) technology since 2003.