



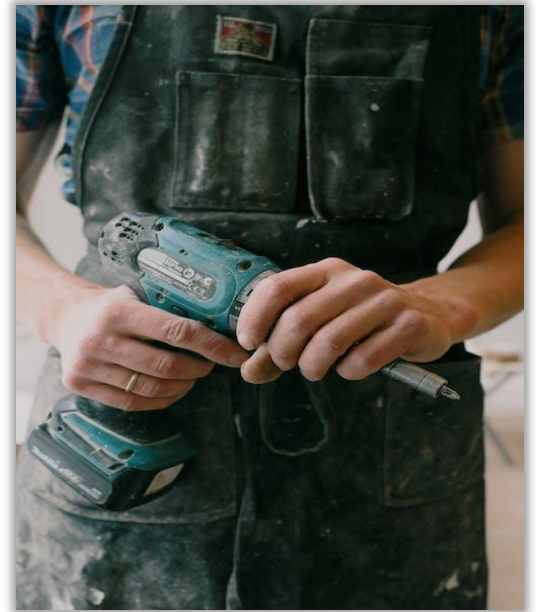
Are you optimizing price and product recommendations?

The Challenge:

A professional field-services provider was facing a complex sales process that relied on sales rep intuition and manual processes instead of customer and product data to provide solutions to their customers. Additionally, management did not have visibility to if and when internal processes were followed, relying heavily on hand-written notes. This resulted in price mismanagement, with sales inadvertently discounting high-tiered products to a lower tier.

The Solution:

INSIGHT2PROFIT interviewed sales reps and joined sales trainings across locations to understand the existing process, challenges, and gaps. Then, we built product positioning and discount models that accounted for key factors such as product features, predictive factors, and desired behavior, and embedded this into our tailor-built in-home application that facilitates all key steps in the sales process. This application was deployed across locations to provide optimal product and price recommendations for sales reps in the field, with built-in sales enablement tools such as suggested questions and quote history. This solution resulted in improved, centralized tracking and measurement, a better in-home experience, and product and price recommendations that met customer needs while improving margin.

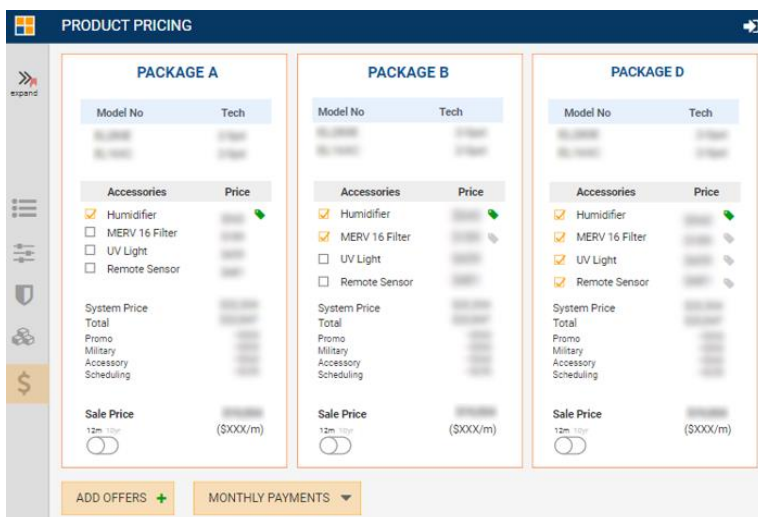


The Results:

- \$14M of impact in year 1
- Increased close rate
- Increased average sales per install

We Implemented centralized pricing and product management, leading to optimized profitability through modeling, technology, and sales effectiveness.

→ [Learn more about price optimization](#)



Example package selection screen from tailor-made in-home application