



the **future** of distribution

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# Leveraging Technology for Sales Success

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Ben Albu – Rocky Rill Ventures



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# Introduction



**Ben Albu**

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**Distributor Partner for Growth**

Enterprise & Technology Strategy  
Business Development / M&A / CVC  
Intersection of Sales & Technology

## Experience

- **23-years** in B2B distribution
- **Former Wesco:** served in leadership roles across digital, M&A, strategy, business development, CVC, finance, operations and value-added services
- **Former Accenture:** served industrial clients in strategy, channel, M&A integration, and enterprise technology implementations
- **Home is Pittsburgh PA:** four kids and wife (each smarter than me)

# Agenda for today

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- Caveat actor
  - Why sales technology projects fail
  - The one thing that absolutely must be in your sales technology
  - The top 8 technologies for sales teams in 2025
  - Sales technology case studies
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# Caveat actor

*“let the doer beware”*

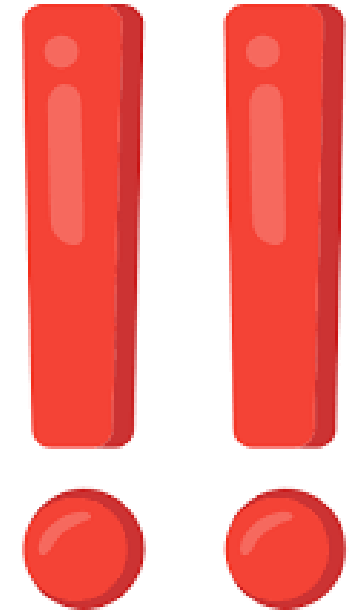


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# Fact: Sales technology investments usually fail

- **CRM Projects:** Studies indicate that over 70% of CRM projects fail to meet their objectives<sup>1</sup>
- **E-commerce / Omni-channel:** Around 80-90% of e-commerce projects fail to deliver on the revenue objectives<sup>2</sup>
- **Digital Marketing Systems:** Around 60% of digital marketing system projects are considered unsuccessful<sup>3</sup>
- **Digital Transformation Projects:** Research indicates that 84% of digital transformation efforts fail to deliver the expected value<sup>4</sup>



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1. <https://rethinkrevenue.com/why-cms-fail-understanding-the-challenges-and-statistics>
2. <https://www.shipscience.com/how-many-ecommerce-businesses-fail-a-comprehensive-look-at-the-statistics/>
3. <https://www.smartinsights.com/managing-digital-marketing/web-project-management/percentage-projects-fail-chart-of-the-day/>
4. <https://altixconsulting.com/resource/the-harsh-reality-why-84-of-digital-transformation-projects-fail/>





# Why are so many sales tools in the tech graveyard?

## **Lack of Strategy or Even Clear Objectives**

- Not aligned with business strategy and/or no defined goal, leading to misaligned efforts

## **Poor Product, Platform or Partner Selection**

- The tech doesn't work, or selecting a partner that is not capable; selecting the wrong product

## **Insufficient Governance**

- Weak project management, wrong approach (blame both waterfall and agile), and lack of stakeholder buy-in, under investment

## **Poor Integration with Existing Systems**

- Failure to integrate with existing systems causes disruptions and inefficiencies within the sales process

## **Insufficient Training**

- Inadequate training leads to users not fully utilizing the technology, reducing its effectiveness

## **Resistance to Change**

- Sales teams may resist new technology, hindering its adoption and limiting project success

While it is wise to avoid these traps, they are not the main cause of most sales technology failures...



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# One frequent issue is observed in nearly all instances of sales technology failures



Not acknowledging that your Salesperson is a **customer** of the new sales tool

Not verifying that the new system delivers **genuine value** for the Salesperson



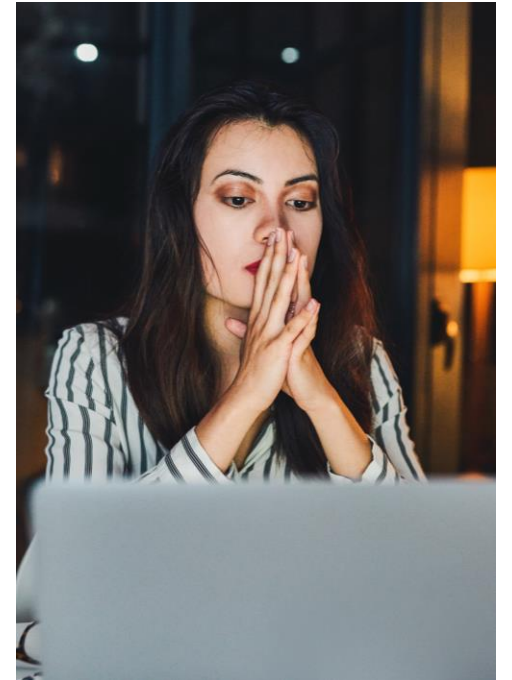
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# Sales roles are unique compared to other job functions

- They enjoy greater **autonomy** compared to other roles within a distributor
- Their earnings are linked directly to their personal revenue or margin
- They often operate in high-stress situations where their decisions can lead to success or failure
- They adapt their strategies based on immediate feedback
- To thrive, they must swiftly adjust to market shifts and customer demands
- They work collaboratively across departments and drive strategic alignment
- Sales teams may view tools or systems as disruptive to *their* workflow




Misalignment between sales needs and tech tool features will cause pushback



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The one critical component of any sales technology product

***Salesperson Hook*** noun

1: A feature that is so enticing that a salesperson genuinely desires to utilize a new tool to access it

or

2: A feature that a salesperson is required to use in order to finish a necessary work task

**Best Practice:** New sales tools include multiple Salesperson Hooks



# Identify your Salesperson Hooks by taking a Product Owner mindset with a “Salesperson as Customer” viewpoint

- Product Owners empathize with salespeople to understand their daily challenges and needs
- Include features in the new sales tool that eliminate painful processes for the salesperson or generally make their day easier or more fun
- Core requirement: Provide an improved experience compared to their current process
- Deploy the new tool only after salesperson hooks are functioning as intended

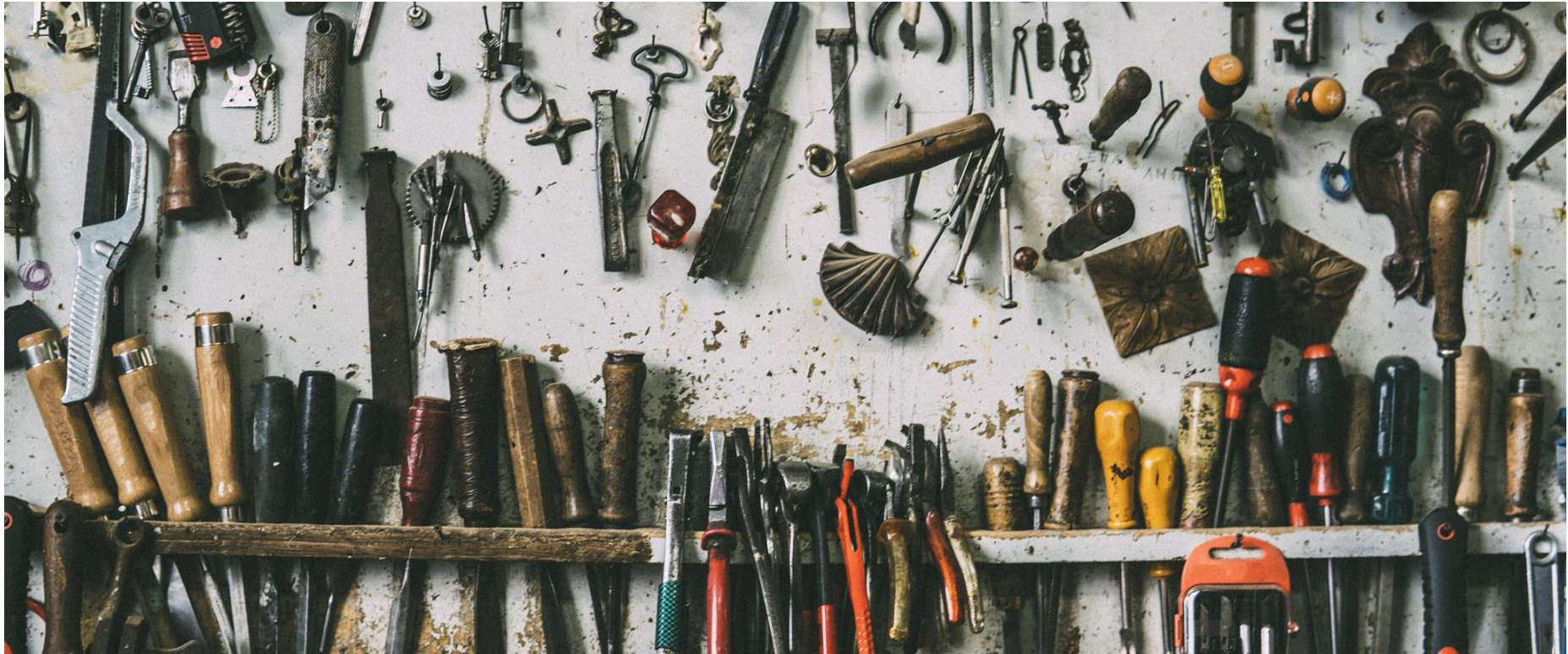


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# The must-have digital tools and technologies for hybrid sales teams in 2025



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# The 8 top sales technology tools for distributors in 2025

## 1. EDI & Order Automation Tools

Streamline order processing and reduce errors

## 2. Sales Intelligence Platforms

Analyze customer data, predict buying behavior and recommend the next best product

## 3. Lightweight Customer Relationship Management (CRM) Systems

Centralize customer interactions and sales pipeline management

## 4. AI-Powered Sales Assistants

Automate lead sourcing, streamline quoting, email personalization, and follow-up

## 5. Sales Enablement Platforms

Provide content management, training, and analytics for sales teams

## 6. Lead Matching & Routing Software

Automatically capture and assign leads to the right sales reps

## 7. Buyer Intent Data Tools

Identify prospects actively researching solutions

## 8. Your top sales capability need



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# Case Study: Regional building products distributor aims to streamline and error-proof order entry

**A \$4B+ distributor of residential building materials**

**Products:** Specialty items including molding, trim, decking, doors, engineered wood, and siding

**Sales Model:** Outside and inside sales

**Supply Model:** Delivery from local branch stock

**Challenges Faced by the Distributor:**

- The majority of customers are small businesses lacking EDI capabilities. They submit purchase orders via email or fax, which necessitates manual order entry
- Numerous purchase orders do not include part numbers, necessitating inside sales to identify the correct items on the order



**Targeted Future State Capability:**

- Automated order entry from email or fax PO





# Solution: AI-powered sales order automation software

## Key Product Features:

- AI-Powered Order Extraction – Converts PDFs, Excel files, CSVs, and purchase order images into structured, error-free digital orders
- Intelligent Data Validation – Identifies and corrects errors before orders are accepted into ERP
- Real-Time Analytics & Benchmarking – Provides insights into order efficiency, automation rates, and accuracy
- Enterprise-Grade Reliability & Security – Features 99.5% uptime, SOC 2 Type 2 certification, and secure AI models.

## Salesperson Hooks:

- None



**Technology partners:** External SaaS solution

**Primary Integrations:** ERP & email

**Launch Timeline:** 1 month from idea conception

## Key Outcomes:

- Achieved over 95% accuracy in deployed areas, resulting in significant annual savings of ISR hours
- Fewer than 25% of branches utilize the capability
- Several sales teams concluded that “it’s not for us”



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# Case Study: Large construction products distributor wants to know what its quoting

**A \$5B+ supplier of construction supplies and equipment**

**Products:** Trade contractor supplies, including engineer-to-order items and commodity products

**Sales Model:** Outside sales with inside and project management, 1,000+ reps in U.S. and Canada

**Supply Model:** A combination of deliveries from local branch inventory using the company's own fleet, along with supplier DS

## **Distributor Challenges:**

- Quoting processes were inefficient, inconsistent, and entirely manual, lacking visibility or tracking of quote history and performance
- Margin performance is unknown at the bidding stage compared to the order stage



## **Targeted Future State Capabilities:**

- Digitize and record all project quotes
- Create visibility of quotes within the sales pipeline
- Gather essential customer contact information
- Assess win rates and margin for opportunities
- Enhance the management of supplier performance
- Enable the possible centralization of back-office sales operations in the future



# Solution: Cloud-based project quoting platform powered by AI

## Key Platform Features:

- Delivered all target future state capabilities
- Automated supplier quote capture
- End to end sales pipeline visibility and analytics
- Mobile and desktop versions
- Invoke quote from email

## Salesperson Hooks:

- Extract data quickly and easily from manufacturer quotes
- Fast and simple proposal generator with professional looking output
- Quote multiple contractors with a single click
- Chat with inside and project team, digital bid board



**Tech partners:** Internally developed by in-house software group, deployment lead by sales team

**Key Integrations:** ERP, email, rep mobile devices

**Time to MVP launch:** 7 months from concept

## Key Outcomes:

- Complete transformation of the quotations process
- 95% utilization by OSR's within first year
- >\$20B quote volume
- Platform for additional improvement



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# Key Takeaways

1

Sales technology projects are risky and **fail more often than they succeed**

2

Achieving success necessitates that a sales technology solution incorporates several **Salesperson Hooks**. Additionally, minimizing the potential for failure can be accomplished by adopting a product manager perspective and considering the salesperson as a **customer**

3

Sales technologies for distributors have come a long way in the past few years, and there are **multiple ready-now solutions** available