



The Front-of-House Playbook:
*Unlocking Orders by Empowering
Every Rep*

Executive Summary

Every distributor has that one rep who's got it all figured out. Call him Jeff. Jeff has something special. He's built rock-solid customer relationships, responds quickly, and reaches out when they're most likely to order. Of course, he gets a ton of orders.

Unfortunately, there's only one Jeff. When your front of house can't see every conversation and order in one place, they can't respond fast or sell proactively. That means you're missing orders you should be winning.

But what if every rep was like Jeff—serving customers fast and driving orders proactively? Think about the effect this would have on your business and on your revenue.

That's why we created this guide. This playbook breaks down how you can replicate Jeff's success across your entire front-of-house. By focusing on three core strategies — **Serve, Centralize, and Drive**, you'll transform every rep into a Jeff-level performer that wins orders.

See the Results Other Distributors Are Getting:

3x

more order capacity with improved customer communication.

30%

more orders with proactive processes in place.

13%

more orders with better data.

“ We went from a couple inspections a year to over 50. From a revenue standpoint, that was about a **50X increase**. That campaign alone paid for Prokeep. **”**

Jeremy Marston | Chief Operating Officer - J.J. Nichting Company

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Driving More Orders with Proactive Sales & Marketing

Turning Service Into Sales to Unlock Growth

Growth doesn't come from waiting for customers to call in—it comes from driving the conversation. Jeff demonstrates this every day; he takes the initiative to check in, suggest add-ons, remind them about reorders, and capitalize on every customer interaction. That's why Jeff consistently outperforms—he drives orders, while others wait for them to come in.

Why It Matters

If your team is only reacting to inbound orders, you're missing out on opportunities to drive more revenue. Customers who don't regularly hear from you often drift toward competitors who are more proactive.

Understanding the Challenge: *Moving Beyond Reactive Sales*

Customer expectations have shifted, and waiting for them to call isn't enough. Research shows:

- 80%** of revenue comes from just 20% of customers.
- 25%** more orders can be won from reactivated customers with proactive outreach.
- 67%** higher average order value for distributors who implement proactive selling strategies.

3X more outbound activity
drives 30% more orders

Jeff flips this script. He checks order histories, spots gaps, and reaches out before competitors can.

Most reps don't do this—not because they don't care, but because they lack the time, systems, and execution to act.

So how do you turn reactive reps into proactive sellers who grow accounts instead of just maintaining them? Here are 3 easy tips to help every rep drive orders the way Jeff does.

Tip 1: Reclaim Missed Revenue – Re-engage Dormant Accounts to Drive New Orders

Allowing dormant accounts to stay dormant is a missed revenue opportunity. Jeff is well aware that 80% of your revenue comes from 20% of your customers, and that means there's a gold mine of potential just waiting to be tapped. With simple intentional outreach, Jeff makes it a priority to re-engage dormant customers and drive orders.

67%

more orders comes from re-activated customers rather than net new logos.

How a Great Rep Drives Orders from Existing Customers:

- 1 Identify Who's Gone Quiet** A great rep pulls a list of customers who haven't ordered in the past 3, 6, or 12 months to tailor his outreach.
- 2 Reach Out Personally** A simple, "Haven't heard from you in a bit. Here's a 20% discount," goes a long way to win a customer back.
- 3 Remedy a Bad Experience** Sometimes, customers fall off because of a frustrating experience. Reach out to see how you can make it up to them.

How Prokeep Reactivates Revenue Hiding in Plain Sight:

- 1 Surface Dormant Accounts** Prokeep records all customer conversation and order history, giving you visibility into who's gone quiet.
- 2 Personalized Customer Outreach** Send promos, event invites, and win-back campaigns that win customers back.
- 3 Create Feedback Workflows** Send surveys to customers who order and create follow-up tasks for negative experiences to prevent loss.

// After an SMS broadcast? We'd do between \$60K and \$100K. One message equaled \$60K in new sales. //

Rusty Thompson | General Manager – Johnstone Supply



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Tip 2: Stop Missing Promotions Because of Time Constraints – *Send Them Out Quickly and Effortlessly*

Ever gotten a 24-hour promotion from an OEM and handed a call list to your reps with a strong suspicion that calls would not be made? Jeff doesn't make that mistake. He knows that promotions are often the final nudge customers need to pull the trigger, and he doesn't waste any opportunity.

70%

increase in average order value comes from proactively capitalizing on every sale.

How a Great Rep Makes Promotions Easy:

1	Segment By Activity Level	Separate out lists of customers by company size, and activity level, so you know which promotions are relevant to whom.
2	Use SMS Marketing	Send promotions with ease by simply texting your customers about upcoming promotions instead of making individual calls.
3	Mention Promotions Often	Even seemingly irrelevant conversations are opportunities to casually mention a promotion and plant the seed.

How Prokeep Powers Proactive Selling:

1	Build Smarter Audiences	Prokeep's Audience Builder uses activity and customer labels to create ready-to-buy audiences.
2	Easy Time Sensitive Campaigns	With Prokeep's AI-recommended templates, you can quickly launch promos with the click of a button.
3	Stop Leaving OEM Dollars on the Table	Use Prokeep to run campaigns that promote OEM products, meet co-op spend requirements, and drive more orders.

“ We went from a couple inspections a year to over 50. From a revenue standpoint, that was about a 50X increase. That campaign alone paid for Prokeep.”

Jeremy Marston | Chief Operating Officer – J.J. Nichting Company

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Tip 3: Stop Sitting on Customer Insights – Turn Them into Timely Recommendations that Drive More Orders

Jeff doesn't just wait for customers to tell him what they need—he already knows. By tracking their buying habits, preferred brands, and upcoming projects, Jeff can offer suggestions that feel more like helpful advice than sales pitches. Because his recommendations are relevant and well-timed, customers see Jeff as a trusted partner, not just a rep.

17%

more daily orders
from proactive
outreach.

How a Great Rep Uses His Knowledge to Drive Orders:

- 1 Knows What to Recommend** Know each customer's brand preferences, so you can suggest relevant products instead of generic upsells.
- 2 Timely Outreach** Anticipate when customers typically reorder or start new projects and proactively reach out with quotes to secure the order in advance.
- 3 Leverages Delivery Routes** Utilize scheduled delivery notifications to mention add-ons that customers often order together.

How Prokeep Turns Customer Knowledge into More Revenue:

- 1 Easy Customer Segmentation** Prokeep centralizes customer data and segments customers into lists to send relevant promotions with ease.
- 2 Generate Quotes Proactively** With Prokeep's AI-recommended templates, you can quickly launch promos with the click of a button.
- 3 Quote Recapture** Prokeep makes it easy to follow up on abandoned quotes and offer discounts or promotions to convert them into completed orders.

“Prokeep has really helped us solidify the fact that we are communicating the right information to our customers.”

Benton Jolly | President - Bowling Green Winlectric



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Serving Customers Faster to Capture More Orders

Serving customers fast is no longer just a competitive edge—it's a business imperative. *Jeff sets the example.* He knows every customer by name, responds instantly, and makes every interaction feel effortless. That is why Jeff's customers order from him again and again.

Why It Matters

If your team is still leaning on traditional service methods—endless phone calls, in-person counter traffic, and reactive order-taking—your reps are leaving orders on the table and losing customers to more responsive competitors.

Learn how to increase orders by enabling your team to respond to every order faster so customers choose you first, place more frequent orders, and return because they trust that the experience will always be quick, seamless, and reliable.

Understanding the Challenge: Meeting Customer Expectations in a Speed-First Market

Customer expectations have shifted—permanently. Research shows that:

67% higher AOV from faster service.

14% accelerated order processing with a seamless experience

20% more orders result from consistent engagement.

80% more orders go to companies that serve customers quickly.

Most distributors are held back by outdated systems, overwhelmed reps, and fragmented communication.

That gap is why so many reps can't "be Jeff." The result? Slow response times, missed orders, and frustrated customers.

How do you make sure customers buy from you and not the competitor down the street? Here are three easy tips to help every rep serve customers faster and win more orders.

Tip 1: Don't Limit How Customers Connect – Let Them Reach You From Any Channel They Prefer

Forcing all customers to order through one channel creates bottlenecks, long hold times, and, ultimately, missed orders. That's why Jeff makes it a point to meet customers where they are and do business the way they want to do it.

9.5%

YOY revenue growth for businesses that use omnichannel communication.

How a Great Rep Meets Customers Where They Are:

- | | | |
|---|--|---|
| 1 | Answers on Every Channel | Don't limit yourself to just the phone or the counter – make yourself always available to take orders through any means. |
| 2 | Responds Quickly, Regardless of the Channel | Prioritizes fast responses across all channels, so you can place the order and move on to the next. |
| 3 | Adapts to Customer's Preference | Taking orders the way your customer prefers ensures they'll come back to you, rather than a competitor that offers options. |

How Prokeep Helps Your Whole Team Meet Customers Where They Are:

- | | | |
|---|---|---|
| 1 | One Inbox for All Channels | Prokeep connects text, chats, email, and fax to one business-dedicated inbox where more orders are closed faster. |
| 2 | Seamless Speed Across All Channels | With all channels connected to one inbox, you can stay focused without flipping tabs or putting the phone down. |
| 3 | Personalized Experience at Scale | With multiple channels and centralized data, Prokeep ensures every customer interaction feels tailored and fast. |

// We're able to multitask. I can take an order from someone over text, email, over the phone, and in person smoothly. So instead of that one order at a time, we're able to take about 3x more orders in the same time frame. //

Rusty Thompson | General Manager - Johnstone Supply



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Tip 2: Eliminate the Wait – Give Customers Instant Quotes and Order Status Updates from Confirmation to Delivery

When your front-of-house team can't see every conversation and order in one place, they can't respond fast or sell proactively, and that opens the door for competitors. Jeff makes it a point to make sure service is quick. Even if he can't solve the problem right away, he acknowledges the customer by saying, "I'll be right with you."

80%

more revenue for businesses that provide quick service.

How a Great Rep Eliminates Wait-Time:

1	Acknowledges Instantly	The moment a message comes in, send a quick acknowledgment so customers know they're getting an answer soon.
2	Sets Alerts	Prioritizes fast responses across all channels, so you can place the order and move on to the next.
3	Keeps Key Details at Fingertips	Memorize common part numbers and stock availability, so customers aren't waiting or turning to faster competitors.

How Prokeep Helps You Eliminate Wait-Time:

1	Instant Auto-Acknowledgments	Prokeep sends an automatic reply the moment a message comes in, so customers know a rep is on the way.
2	Built-in Alerts	If a message sits unanswered, Prokeep flags it so nothing slips through the cracks and customers aren't left waiting.
3	Centralized Product Knowledge	With stock & quote lookup and order details in one place, reps can respond quickly and accurately.

// We have a couple of branches that really only have 1 full time counter person in their management those branches have done extraordinarily well with Prokeep because they can multitask so well. They can handle 3 or 4 customers with Prokeep versus just one on the phone. //

Susan Dunn | Corporate Inventory Control Manager - *Truckworx*



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Tip 3: Stop Leaving Customers Guessing - Send Instant Quotes and Order Status Updates

Jeff eliminates any uncertainty by keeping customers in the loop at every stage, from quote to confirmation to delivery. By sending instant updates, he builds trust, reduces call-backs, and gives customers confidence that their order is moving forward without a hitch.

50%

of orders go to the business that sends quotes first.

How a Great Rep Keeps Customers in the Loop:

- | | | |
|---|-----------------------------------|---|
| 1 | Send Quotes Fast | Turn requests into quotes instantly, giving customers a reason to choose you over your competition. |
| 2 | Confirms Orders Right Away | Inform customers the moment their order is placed, reducing turnover and making it easy for them to order from you again. |
| 3 | Real-Time Updates | From quote approvals to delivery notifications, proactive updates eliminate uncertainty and enhance the overall experience. |

How Prokeep Keeps Your Customers in the Loop:

- | | | |
|---|---------------------------------------|---|
| 1 | Instant quotes | Prokeep uses AI-powered Order Automation to match inventory, check stock, and generate quotes in seconds. |
| 2 | Automatic order confirmations | Every order placed through the ERP triggers an automatic confirmation sent through Prokeep. |
| 3 | Real-time status notifications | Updates aren't limited to order confirmations; customers are automatically notified all the way until the product is at their door. |

“It's as quick as sending a text—no more tying someone up on the phone for 90 seconds. And those 90 seconds add up over a week, over a month. Saving that time keeps reps engaged with customers instead of bogged down in simple tasks.”



Ryan Plowman | Owner - Pomona Truck & Auto Supply

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Visibility Drives Orders:

Lead with Clarity, Not Complexity

Having centralized customer data puts you in control of your key customer relationships and opens up new opportunities to grow and scale your business. Without confidence in the data you're working from, you can't leverage that information to drive orders.

Why It Matters

Jeff shows us that strong customer relationships don't just come from fast service—they also come from clear visibility. When Jeff follows up with a customer, he recalls the quote from last week, the current status of the order, and any outstanding issues. That consistency strengthens relationships, **drives more orders**, and turns data into revenue gains.

Understanding the Challenge: Meeting Expectations with Clear Visibility

Most reps can't operate like Jeff. They're juggling siloed inboxes, disconnected spreadsheets, and scattered notes. Jeff avoids this by keeping everything straight in his own system, but scaling that across an entire business is nearly impossible without the right tools.

Customers don't just want fast service—they want certainty:

73%

of buyers choose distributors that offer personalized experiences.

80%

of sales reps say good data helps them build customer loyalty.

\$3.7

trillion in risk comes from poor customer experiences and siloed data.

80%

of businesses have reported increased revenue along with better data.

Most reps lack Jeff's memory and discipline—and without centralized visibility, things often slip through the cracks.

The result? Lost trust, lost opportunities, and lost revenue.

So how do you move from confusion and scattered data to clarity, alignment, and trust? Here are 3 easy tips to make every rep operate with Jeff-level visibility.

Tip 1: Stop Working with Incomplete Data – Build Complete Customer Profiles that Give You the Full Picture of Every Relationship

Jeff knows the value of a complete customer profile. It's more than just a name and phone number—it's a living record of a customer's contact details, industry, title, company, and project history, that helps him provide tailored service.

40%

more revenue for businesses that use personalization compared to those who don't.

How a Great Rep Keeps Accounts Organized:

- 1 Segments for Growth** By tagging customers as active, dormant, or at-risk, you know exactly where to reach out to get that order.
- 2 Turns Data into Action** Use data to spot risks, identify opportunities, and turn insights into revenue.
- 3 Drive Orders with Precision** Using purchase history and brand preferences, deliver the right promotions to the right customers at the right time.

How Prokeep Lets You Leverage Customer Insights for Better Service:

- 1 Spot Opportunities to Drive Orders** With all customer contacts and notes unified, reps know who's active or dormant and can reach out to them with relevant offers.
- 2 Turn Insights into More Orders** Every past conversation and detail is actionable, helping reps move from reactive service to proactive account protection.
- 3 Tracks Order & Quote History** Purchase patterns, frequency, and brand preferences are logged automatically, enabling reps to anticipate customer needs.

“It's just a very fast, easy way that folks are accustomed to using because it's a text stream. Prokeep has meant access to information and the ability to deliver answers quickly to our client base.”



DJ Lee | President - Professional Flooring Supply

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Tip 2: Stop Guessing What Customers Need – Use Order History to Anticipate their Next Purchase

Jeff takes that foundation a step further. Beyond names and contact details, he remembers buying habits, brand preferences, and upcoming projects. With that knowledge, he can tailor recommendations, suggest add-ons, and anticipate needs before customers even ask.

52%

of consumers buy more when experiences are tailored.

How A Great Rep Knows His Customers So Well:

- 1 Tracks Patterns Over Time** Remember customers' order preferences and what items are often ordered together, so you can tailor recommendations.
- 2 Stays Ahead of Project** Anticipate when customers have big jobs coming up, securing their order before they can go to competitors.
- 3 Knows When to Upsell** Give personalized recommendations and offer relevant add-ons or upsells during every conversation.

How Prokeep Fixes the Visibility Gap:

- 1 One Record for Every Customer** Calls, texts, faxes, emails, and chats all flow into a shared profile, so your team can identify patterns and use that to drive orders.
- 2 Quotes and Follow-ups Tracked Automatically** Every request, update, and response is logged, so reps can anticipate needs and secure advance orders.
- 3 Team-wide Transparency** With a centralized inbox, leaders can trust nothing slips through the cracks, and reps can up-sell based on order history, regularity, or brand.

“ The biggest day-to-day difference Prokeep brings to Ideal Supply Inc. is visibility into the channel. It helps us understand where customers are reaching out and how the business is performing. ”

Chris Moon | General Operations Manager – *Ideal Supply*

 **IdealSupply**

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Tip 3: Stop Letting Errors Cost You Orders – Keep Everything Documented So Your Team Stays Accurate

Jeff knows that mistakes cost more than money; they cost time and trust. That’s why he double-checks details, keeps records straight, and makes sure nothing slips through the cracks. By staying organized and accountable, Jeff not only reduces errors but also gives his customers confidence that every order will be handled right the first time.

27.5%

of data entry errors come from manual input.

How a Great Rep Minimizes Errors:

- | | | |
|---|---------------------------------------|---|
| 1 | Standardized Processes | Maintain a customer follow-up workflow that allows you to drive orders consistently and easily. |
| 2 | Shorten the Search for Answers | Keep data easily accessible so you can turn customer information into more orders. |
| 3 | Eliminate Inconsistencies | Ensure that information is always up to date and accurate so you know as much as possible about your customers. |

How Prokeep Cuts Errors and Boosts Accountability:

- | | | |
|---|---|--|
| 1 | Accurate Order Placement | With a system of record for accountability, your team no longer loses orders due to errors. |
| 2 | ERP & Communications in Sync | Prokeep integrates with your ERP, so contact information and order status automatically match across systems. |
| 3 | Answers Without the Digging | Prokeep uses AI to generate relevant quotes and makes stock look-up easy, so customers can order what they need instantly. |

// To be able to tell a customer you can just shoot me a picture of something. People know that there’s not a mistake really that can be made if I have the picture of what they’re looking at. //

Jordan Kopfman | Inside Salesman - Charles D. Jones



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From Top Performer to Team Standard: Scaling Jeff's Success Across Your Team

Every distribution branch has a Jeff. He represents what's possible when service and sales come together. He knows his customers, responds without delay, and takes the initiative to drive orders instead of waiting for them. That's what makes Jeff the top performer every distributor wishes they had more of.

The good news? With the right systems and processes in place, every rep can operate at Jeff's level. Scaling success isn't about hiring more Jeffs—it's about equipping your entire team to serve, centralize, and drive the way he does.

Bringing It All Together with Prokeep

The Prokeep Order Engine gives distributors the tools to turn service conversations into sales. It brings messaging, quotes, order updates, and marketing together in one place so reps can respond quickly, stay informed, and follow up at the right time.

How the **Order Engine** Works

1

Centralize Every Conversation — No more bouncing between phones, faxes, emails and texts. The Order Engine pulls every message, quote and update into one connected workspace so reps see the full picture and never miss an order.

2

Turn Service into Sales — Every conversation is an opportunity. With built-in quoting, order status updates, and proactive outreach tools, the Order Engine helps reps turn routine service questions into closed sales.

Activate Customer Data — Your team doesn't just respond — they anticipate. The Order Engine surfaces order history, buying patterns, and customer preferences so reps can follow up at the right time, protect accounts, and drive repeat business.

3

Launch Campaigns That Drive Orders — From promotions and win-backs to even invites, reps can send timely, targeted campaigns through customers' preferred channels—powered by AI recommendations that make execution fast and effective.

4

Scale Jeff's Impact Across Every Branch — Your best rep already knows how to build loyalty, move fast, and keep orders flowing. The Order Engine makes it possible for every rep, at every location, to sell like Jeff—so no opportunity slips through the cracks.

5

The Order Engine makes the “Jeff standard” achievable for every rep, every day.

By combining *Serve, Centralize, and Drive* into one **connected front-of-house platform**, distributors can respond faster, keep every customer interaction in one place, and launch proactive campaigns that drive measurable growth.



And the results speak for themselves:

300% increase in online sales.



3x spike in daily orders.



50x increase in promotional revenue.

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142% more orders in a single month.



The future of distribution isn't about hoping you've got a Jeff—it's about giving every rep the tools to operate like one.

With the Prokeep Order Engine, turning service into sales becomes the rule, not the exception.

Ready to see it in action?

Get a Demo of Prokeep and learn how you can start driving **more orders today**.



[Request a Demo](#)

How Top Reps Win Orders and Retain Business

Drive: Turn Interactions into More Orders

Stop Letting Dormant Accounts Slip Away

- ☐ **ID Who's Gone Quiet** – Identify customers who've gone quiet and target outreach.
- ☐ **Reach Out Personally** – Personalized messages spark re-engagement and orders.
- ☐ **Make it Easy to Come Back** – Make buying easy so customers return again and again.

Stop Missing Promotions Because of Time Constraints

- ☐ **Segment By Activity** – Organize customers by activity to target offers strategically.
- ☐ **Use SMS Marketing** – Send promotions at scale with one click, no call sheets needed.
- ☐ **Plant Promotion Reminders** – Use every conversation to keep offers top of mind.

Stop Sitting on Customer Insights

- ☐ **Tailor Recommendations** – Suggest products based on order preferences.
- ☐ **Time Outreach Right** – Reach out when customers are most likely to buy.
- ☐ **Use Delivery Touchpoints** – Turn scheduled drops into opportunities for add-ons.

Serve: Win Customers With Speed and Reliability

Don't Limit How Customers Connect

- ☐ **Answer on Every Channel** – Be available anywhere customers want to order.
- ☐ **Respond Fast Everywhere** – Prioritize speed to capture more orders.
- ☐ **Adapt to Customers** – Match their style so they return to you, not competitors.

Eliminate the Wait

- ☐ **Acknowledge Instantly** – Respond right away so customers know they're covered.
- ☐ **Never Miss a Message** – Set alerts to ensure every inquiry and order gets answered.
- ☐ **Keep Details Handy** – Recall key info fast to serve customers before competitors do.

Stop Leaving Customers Guessing

- ☐ **Send Quotes Fast** – Turn requests into quotes instantly to win before competitors.
- ☐ **Confirm Orders Instantly** – Inform customers right away and secure repeat business.
- ☐ **Real-Time Updates** – Keep customers informed at every step to drive more orders.

Centralize: Use Data For Smarter Selling

Stop Working with Incomplete Data

- ☐ **Segment For Growth** – Tag customers to know when to reach out to win the order.
- ☐ **Turn Data into Action** – Spot risks, find opportunities, and turn insights into revenue.
- ☐ **Drive Orders with Precision** – Use order data to deliver the right offer at the right time.

Stop Guessing What Customers Need

- ☐ **Track Patterns** – Know customer habits to tailor recommendations.
- ☐ **Stay Ahead** – Anticipate big jobs and secure the order first.
- ☐ **Make Upsells Relevant** – Offer add-ons and recommendations that drive more revenue.

Stop Letting Errors Cost You Orders

- ☐ **Standardize Workflows** – Consistent processes drive consistent orders.
- ☐ **Keep Info Accessible** – Easy access to data means faster responses and more sales.
- ☐ **Eliminate Errors** – Accurate data prevents mistakes and protects orders.

Executive's Rollout Plan for Modernized Revenue Growth

Drive: How Prokeep Helps Your Team Drive More Orders and Turn Customer Interactions into Revenue

- ☐ Surface Dormant Accounts for win-back campaigns.
- ☐ Build Smarter Audiences with AI segmentation.
- ☐ Run Targeted Campaigns that meet OEM co-op requirements and generate branch orders.

Serve: How Prokeep Elevates the Customer Experience to Retain and Win More Orders

- ☐ One Inbox for All Channels to cut costly errors.
- ☐ Instant Auto-Acknowledgement and Built-In Alerts so no customers are left hanging.
- ☐ AI-Powered Quotes & ERP Confirmations orders placed, confirmed, and updated in seconds.

Centralize: How Prokeep Turns Data Into Revenue

- ☐ Unified Records so you can spot risks and opportunities in one view.
- ☐ Team Transparency allows branch leaders to see what's working, reps to act on insights fast.
- ☐ ERP Integration prevents re-entry errors, cutting lost orders due to mistakes.

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