

Bartercard Shaves Days off Sales Process with GoFormz



bartercard

GoFormz replaces paper forms delivered via courier bags to streamline the sales process

Reporting features from GoFormz provide trade brokers with key customer insight

Non-technical users convert existing PDFs to online forms in minutes, without training

AT-A-GLANCE

INDUSTRY

Barter trade exchange

CUSTOMER SINCE

2013

FORMS

new member application form, expense analysis form, direct debit form, new members kit receipt form, lost card form, directory listing alteration form, additional card holder form, offer to supply form, trade purchase request form, trade voucher form, transaction reversal request form

WHY GOFORMZ?

- Needed to modernize a paper-based sales process that required couriers to deliver signed new member forms
- Required reporting capabilities to analyze customer expense data
- Required a sophisticated, yet simple solution that non-technical users could pick up quickly

BENEFIT OF MOBILE MEMBERSHIP APPLICATION FORMS

- Decreased sales processing time from 3 days to 30 minutes
- Spearheaded sales process modernization, setting an example for other countries

THE FULL STORY

Since its launch in 1991, Bartercard has revolutionized the way businesses manage cash flow. Bartercard's world-leading Trade Exchange system now enables over 55,000 card holders in seven countries to benefit from the cashless economy of barter. Bartercard members improve profits and reduce expenses in their business through the trade of excess goods or filling idle capacity.

Bartercard turns to GoFormz to modernize sales operations in pursuit of aggressive growth goals

With an aggressive goal of reaching 500,000 members in 20 regions across the United States by 2020, Bartercard USA wanted to maximize sales efficiency by eliminating a cumbersome, paper-based sales process. After making a sales presentation, Bartercard sales reps presented a paper form to obtain a new member's signature and business information. If changes were necessary, a new form had to be printed—wasting time and money.

Once signed, the sales rep physically delivered the form to a franchise manager, who made recommendations and also signed off on the form. From there, a courier would deliver the form to the new member team at the national office. Here, each form was processed manually, and illegible forms further increased the delays of having to rekey all the customer information.

Bartercard recognized that the 3-day process comprised their growth goals, and turned to GoFormz to eliminate paper forms, streamline their business and present a modern professional image.

“GoFormz is so easy to use, I can turn any PDF into a mobile form in minutes, without any training. It's also the most sophisticated solution I've evaluated.”

Paul Bolte, President & CEO, Bartercard USA

GoFormz cuts the new member sales process down to 30 minutes, with better accuracy

With GoFormz, Bartercard sales reps enter sales meetings equipped with an iPad and a GoFormz new member application form. With GoFormz, they're able to pre-populate the new member application with relevant information and

easily make changes on-the-fly, without having to return to the office to print another copy. They can secure a customer signature right from the iPad, and send the signed form to the franchise manager in a matter of minutes, not days. Bartercard has eliminated the courier step all-together, as well as errors and illegible entries. The whole process—from point of sales to point of processing—now takes just 30 minutes.

“With GoFormz, we've sped up our sales process by eliminating paper and increasing accuracy,” comments Paul Bolte, President and CEO of Bartercard USA. “We hope to see our other countries follow suit and modernize across the globe.”



GoFormz reporting capabilities are a natural fit for Bartercard trade broker analysis needs

In order to help members develop new connections with each other, Bartercard performs a sophisticated analysis of the profit and loss data of each business in its network. Since GoFormz supports reporting on all data collected, Bartercard has also developed electronic expense analysis forms for trade brokers.

Each expense analysis form contains over 1000 fields that not only capture, but also calculate profit and loss data from customers. Trader brokers use the form to gather data from customers, like advertising spend each month, to generate a report and make recommendations on ways they can replace cash spend with trade dollar spend.

For Bartercard, GoFormz provides a high level of sophistication to modernize operations, without compromising ease of use.