

Smart 



Smart Energy Broker

Enhance efficiency, improve sales performance and streamline the procurement process with the Smart Energy platform

www.smart-ltd.co.uk

odoo

Gold Partner



Shorten sales cycles, ensure contractual compliance and improve customer service with software built for the energy procurement brokerage market.

- Do you have issues with your LOA's being stored in folders, in people's emails and faxes filed in desk drawers?
- Are termination reminders tracked on a spreadsheet and easily missed?
- Do you know whether you've checked for objections on every contract?
- Are you certain that the supply went live on the agreed date?
- How are you tracking energy consumption?
- What about your openers? Do you know who they are calling? Are there disputes over who 'owns' each lead? Are you truly digging deep into the pool of thousands of leads that you bought or are you barely scraping the barrel and spending more time on call backs or duff data?
- Are you certain that you have every MPAN/MPR documented correctly?
- Do you have a way to manage changes in the top line?

These daily challenges translate into hundreds of hours of lost productivity every year. Smart IT's Smart Energy Broker software solution solves these issues.

Custom built specifically for the energy procurement sector, the integrated modular solution helps you work smarter, more efficiently and increase customer service levels.

Totally customisable, modular platform

Lead generation

The Lead Generation module seamlessly manages the telesales process from the allocation of raw leads up to the point when your organisation effectively wins the business and takes receipt of copies of your customers' bills and letters of authority to act on their behalf.

Leads can be categorised by SIC code and automatically allocated to specific telesales operatives who are specialists in those sectors. The system is designed in such a way that your telesales team has a managed and controlled pipeline with a practicable number of quality leads and call backs.

This module can also be used as a 'stand-alone' lead generation system as it has the adaptability, scalability and feature set to service virtually any market, sector or industry.

Procurement

The procurement module supports the entire tendering process and monitors supplier quotations. Your energy analysts can capture information such as site, meter, contract and energy usage with easy data input methods for large multi-site and multi-meter corporations, whilst conducting automatic cost comparisons based on available information.

Via a Matrix Pricing Wizard, users can select the meter and site and enter the current usage details, charge line fields, contract details within the wizard and then press 'Get Quotes'. This constructs a UD API request using the plans and suppliers obtained from the UD Group CRM Controller. This generates a list of quotes and shows a Unit Rate Uplift, if option chosen, Standing Charge Uplift (pence/day), Commission, Supplier, Term, Date Rate, Standing Charge, Annual Cost, Difference, % & Actions. When a cost comparison is selected it will automatically add it to the prospect and generate the new quote groups and quotes.

It supports all industry charge types and keeps pace with the moving nature of the energy industry. You can send tenders and receive quotations to and from multiple suppliers within this module with the peace of mind that the entire workflow process is monitored and tracked from start to finish.

Once a deal is agreed the system mandates the addition of a verbal or a signed copy of the contract. The quality assurance process ensures contracts are drawn up accurately from the point of sale. The signed contract is stored against the customer account within the integrated Document Management system and this acts as the workflow catalyst to move the sale through to the Energy Contract Management module.

Contract Management

The module's scheduling facility also monitors upcoming renewals before contract end dates, so your end user can ensure consistently high client retention rates.

Benefits

- Simple to use system with minimal training required.
- Low cost per seat based on an operational expenditure model with limited capital outlay and predictable spend.
- Real-time visibility and reporting across sales, contracts and procurement.
- One-stop-shop solution: other integrated modules that Smart Energy Broker users can access include: finance, HR, marketing, project management and logistics.
- A scalable solution that grows together with your business. Smart Energy Broker adapts to the growth of your business—without user restrictions or storage limitations.
- Immediate access to your information enables you to identify sale opportunities, launch new products, and offer advanced customer support, helping you grow your business and increase profits.
- Improved business efficiency and employee productivity: a unified information centre that houses all of your business data allows employees to save valuable time, make quick business decisions, and generate new business.
- Advanced customer service: a high-tech customer management solution gives you the ability to improve customer satisfaction and create business opportunities by offering comprehensive support.
- Enhanced business control: use the fully customisable dashboard to manage and control your business, and receive real-time updates, alerts, reminders, and statistics.
- The quick implementation process guarantees you'll be able to benefit from the system's capabilities in no time.



Key features

- Automatically categorise and allocate leads
- Sales pipeline management
- Comprehensive energy usage data analysis
- Native integration with UD Group to obtain and compare energy prices from across the industry
- Allows for bespoke tendering process and quote management
- Monitor and secure energy contract renewals
- Track and schedule contract terminations
- Quote conversion to contract, sale completion
- Contract acceptance
- Generate automated quotes and contracts
- Add/manage commissions
- Itemised reporting, including broker commissions
- Total transparency - automate and track all customer communications

The Smart Energy Broker platform enhances the efficiency and sales performance of TPIs by streamlining the procurement process and improving engagement with SME and corporate customers.

With an unrivalled insight into the needs and demands of both client and supplier, our software solution ensures that the role of the energy broker is integral to b2b energy, water and utilities procurement processes.

“The Energy solution has been embraced by employees right across the business. Management acknowledges the Odoo platform has the scalability and flexibility to grow with the company’s ambition. As such we’re already reviewing the HR and Finance modules to help us run the business more efficiently in an integrated fashion. **Great Annual Savings**”

Why choose Smart IT?

Smart IT is a leading Gold partner for Odoo in Europe.

The relationship we build with each of our clients goes far beyond being a simple solutions vendor. We strive to be a trusted business partner and are committed to treating each one of our clients regardless of their size with the same high level of customer service and respect.

In-house development capability

We have excellent in-house Odoo development capability with a 20-strong software team directly employed by Smart IT – unlike many of our peers who outsource programming work abroad, often to unaccredited suppliers.

Established Odoo practice since 2011

We launched our Odoo practice in 2011. With nearly ten years' experience of Odoo implementations and thousands of hours of consulting, we continuously look for ways to improve our relationships with our clients.

Extensive service offering

Our commitment to your company doesn't end once your new system is up and running. We offer a wide variety of services for existing clients, including on-site training and ongoing technical support.

Multi-talented team

Our staff includes senior consultants, software engineers, project managers, and support technicians with an average of ten years' experience.

Customisations to fit your business model

We have the development know how to make sure the system you purchase from us fits your business like a glove. No customisation request is too simple or too complex.

Odoo certifications

As the leading Odoo Gold partner in the UK we have 11 Odoo certified consultants – this is more than any other partner in the region. We have made it a requirement for all new consultants to be upskilled through the Odoo certification programme within 3 months of joining Smart IT.

Full support services

We offer full-service desk support with extended hours as standard. Client collaboration and communication is provided through a bespoke portal built on the Odoo platform.

Project methodologies

We have very strong and well-established project methodologies developed specifically for Odoo.

Head Office

44D Progress Business Park,
Orders Lane, Kirkham
PR4 2TZ, United Kingdom
t: 0844 811 8270

Manchester Office

111 Piccadilly
Manchester
M1 2NY
t: 0161 961 0050

Edinburgh Office

Westpoint
4, Redheughs Rigg
South Gyle
Edinburgh
EH12 9DQ
t: 0131 350 0053

Canada Office

Suite 170, 422 Richards Street
Vancouver
British Columbia
Canada
V6B 2Z4
t: +1 (604) 305 1616

e: info@smart-ltd.co.uk
www: www.smart-ltd.co.uk