

Smart 

# Smart Energy Broker

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





# WE SPEAK YOUR LANGUAGE AND UNDERSTAND YOUR PROCESSES



- **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 Information Technologies' (Smart IT) 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.*

# FAST IMPLEMENTATION. EASY TO BUY. COST EFFECTIVE SAAS MODEL



Over £500,000 has been invested developing this software specifically for the energy procurement market. Built originally for Inspired Energy plc, Smart Energy Broker reflects the industry's distinctive sales cycle and business processes.

Offered as a subscription-based model, Smart Energy Broker is sold 'as a service' at a predictable price per seat per month. So, you don't have a large capital outlay and can start reaping the benefits of the system quickly, and easily.

***"With this project, we haven't only gained an efficient system, but a whole new way of working." Great Annual Savings.***

# TOTALLY CUSTOMISABLE MODULAR PLATFORM



## 1. 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.

## 2. 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.

It supports all industry charge types and keeps abreast 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.

## 3. 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.**

*“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.**

# KEY FEATURES



- **Automatically categorise and allocate leads**
- **Sales pipeline management**
- **Comprehensive energy usage data analysis**
- **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**

# ABOUT SMART IT



Smart IT **delivers business agility** and **increases competitive edge** to organisations across the UK through the deployment of **innovative business process automation**.

Smart IT provides end-to-end **integrated software solutions** to clients to support **business growth, increase productivity** and **reduce system complexity**. Services include consultancy, customisation, software development, implementation, system upgrades and integrations, and training.

One of only two Gold partners in the UK, Smart IT is the UK's leading Odoo partner with more than forty successful implementations across many industries.

The IT managed services division provides 24/7 IT system and application support.





# TRANSFORM YOUR BUSINESS



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.

## TRANSFORM YOUR ORGANISATION AND GET STARTED WITH A SMART ENERGY BROKER ASSESSMENT.



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