

 **From 'Bar Napkins' to a Sales Powerhouse:****How Wholesale Payments United 500 Reps and Drove Growth with SPOTIO**

Wholesale Payments, a nationwide merchant services provider, armed its large, distributed field sales organization with SPOTIO to solve critical challenges around disorganization, inefficiency, and a lack of accountability. The implementation created a unified and consistent sales process, transforming a team reliant on “pen and paper” into a data-driven powerhouse, resulting in increased sales, faster rep onboarding, and a significant return on investment.

**Lubbock, Texas****Merchant Services****B2B****wholesalepayments.com** **The Challenge**

Before SPOTIO, managing a large, independent sales force was a significant challenge. The organization lacked a centralized system, leading to widespread inconsistency and inefficiency.

Fragmented Processes

There was a “general lack of organization”. Reps used everything from “crayon, on bar napkins, to Excel spreadsheets, to index cards” to manage their pipeline. Pamela Zuniga, Director of Sales and Growth, described the previous method of “old school pen and paper, emailing, texting, calling “as simply a mess.”

Lost Revenue from Missed Appointments

A critical pain point was the disconnect between the internal call center and the field. Leads for set appointments were sent via email, which often got lost. This resulted in “a lot of appointments being missed”, which meant losing “closed deals that eventually help payments.”

Lack of Managerial Insight

Without a unified platform, managers struggled to see who was working and where reps needed coaching. As Executive Vice President Avery Lawson noted, without a tool to verify visits, reps could complain about lead quality without ever having gone to the appointment.

Inefficient Field Activity

With no routing capabilities, reps were “everywhere in the sales field.” The company needed a way to help them “minimize their time for gas” and better organize back-to-back appointments.

 **The Solution**

Wholesale Payments knew it needed a single, cohesive platform to bring consistency and accountability to its sales process. The company chose SPOTIO over other options primarily because it was “user friendly” and backed by an “ultra responsive” team that made implementation easy.

According to Lawson, the partnership has been key. When Wholesale Payments needed custom features—such as the ability to transfer a departing rep’s leads to a new hire in the same territory—the SPOTIO team worked to “make it happen,” calling it “another game changer.”

The team now leverages SPOTIO for:

- ▶ **Centralized Pipeline Management:** Reps track all appointments, follow-ups, and lead stages in one place.
- ▶ **Route Planning:** A map-based view allows reps to plan their routes, save on gas, and efficiently manage their territory.
- ▶ **Real-time Mobile Updates:** Reps can “walk out of business, make a quick update, walk to your next one,” making organization seamless.
- ▶ **Data-Driven Management:** Managers can now see rep activity, identify where breakdowns occur, and use the data to conduct targeted, one-on-one coaching sessions.

▶ Game-Changing Results

Since implementing SPOTIO, Wholesale Payments has seen a marked improvement across its entire sales organization.



“Partnering with SPOTIO has been a game changer for managers. All our top producers use it — even our newest reps adopted it right away because it’s the bedrock of their success.”

Eric Dempster, General Manager, Wholesale Payments

Increased Sales and Productivity: The platform has “absolutely” helped drive increased sales for the company. Lawson confirms that SPOTIO has “definitely” contributed to an increase in key metrics.

Universal Adoption: The platform’s ease of use led to immediate buy-in. “All of our top producers use it,” Lawson says. “Everybody adopted it because it’s a bedrock of success.”

Faster New Rep Onboarding: SPOTIO has become one of the biggest factors in getting new hires productive quickly. Lawson calls it a “game changer for helping new reps get going” and credits it with improving “new rep production.”

Eliminated Lead Duplication: The system automatically alerts reps if a lead has been visited before, which has “helped tremendously by ... reducing the amount of double bookings per lead.”

Enabled Data-Driven Coaching: SPOTIO provides managers the “data you need to make decisions in real time to steer the ship where it needs to go.” By pulling reports on lost appointments, they can identify struggling reps and provide coaching to course-correct performance.

For Wholesale Payments, SPOTIO became the unifying force that transformed its disparate field sales activities into a streamlined, accountable, and high-growth operation.



“We chose SPOTIO because it’s user-friendly and ultra-responsive. When we need something, they make it happen — that partnership has been amazing.”

Pamela Zuniga, Director of Sales Growth, Wholesale Payments

▶ About SPOTIO

SPOTIO is the premier field sales engagement platform designed specifically for field sales teams to increase pipeline growth, enhance productivity, and close more deals. SPOTIO centralizes field sales activities, offering organizations critical insights and visibility to drive revenue. Serving thousands of customers globally, SPOTIO is committed to propelling field sales teams to new heights.