

Interviewee:

**David Yost,
Corporate Trainer**

Industry:

**Home Security (ADT
Authorized Dealer)**

Market Position:

**Nation's #1 ADT
Authorized Dealer**

Scale:

**100 Offices
Nationwide**

SalesRabbit Tenure:

**8+ Years (Since
August 2017)**

SalesRabbit Case Study: **Safe Haven Security**



Managing 10,000
Daily Leads:

**How the Nation's #1 ADT Dealer
Saved 200 Management Hours Daily**

200
Hours Saved Daily

By automating the manual data entry of leads across 100 offices, Safe Haven reclaimed 200 management hours

2x
Document Accuracy

Digital forms have cut contract completion time in half while significantly reducing legal and corporate errors.

Zero
Downtime

Safe Haven reports that their platform is now "flawless" and they have experienced no issues or downtime over the last few years.

The Challenge – The Manual Bottleneck

The "Paper Trail" Problem: Before SalesRabbit, Safe Haven's process was entirely manual. Leads were printed on paper sheets and handed to field reps, who marked them up by hand.

The Administrative Cost:

- **Manual Entry:** Managers had to manually transcribe handwritten notes into Excel spreadsheets every single day.
- **Time Loss:** This process consumed approximately two hours per day, per office.
- **Inefficiency:** With 100 offices, Safe Haven was losing 200 hours of management time daily to pure data entry.
- **Accuracy:** Paper documents were prone to errors, often requiring four-page contracts to be filled out by hand with customers.

The Solution – Transition to Digital Speed

The Implementation: Safe Haven transitioned to SalesRabbit to digitize the entire field-to-office pipeline.

Key Transformation Points:

- **Lead Automation:** Instead of manual printing, 10,000 leads are imported into SalesRabbit daily and assigned to reps digitally.
- **Seamless Dispositioning:** Field results are synced to the integrated CRM system instantly when a rep pushes a status button.
- **Digital Documentation:** Four-page paper contracts were replaced by SalesRabbit digital forms, which reps can complete on-site in half the time with complete accuracy.

Lead Management & Territory Optimization

Optimizing the Field Force: Safe Haven has identified a "sweet spot" for field activity to ensure their 10,000 daily leads are maximized.

- **Targeted Volume:** Each rep is assigned a target of 30 leads per day.
- **Time Block Strategy:** Reps utilize "recon time" between 2:00 PM and 5:30 PM to mark off non-movers and talk to available owners.
- **Prime Time Execution:** The digital map allows reps to focus their prime selling hours (5:00 PM to 8:00 PM) solely on confirmed homeowners.



“

“SalesRabbit helps us become more efficient in the field... Without that data, you're just guessing as to what's going on. Having that information coming back from SalesRabbit has been extremely helpful for coaching reps.”

-David Yost

”

Accountability & Real-Time Verification

Establishing Trust Through Data: With hundreds of reps in the field, Safe Haven uses SalesRabbit to verify that reps are actively working their territories.

- **User Locations:** Managers monitor real-time locations to ensure reps are in their assigned territories rather than at home.
- **Proximity Indicators:** This feature verifies that a lead was dispositioned while the rep was physically standing at the door.
- **Eliminating Patterns of Fraud:** Managers can now identify patterns where reps might be "pretending" to work by marking leads as "Not Interested" from their couch.

Ready to modernize your home security or telco field operation?

Book a Demo