TRACTOR ZOOM | AG REVOLUTION

EQUIPMENT DEALER PLAYBOOK

Turning Quotes Into Sales

How tightening your quoting workflow speeds up deals, protects margin, and positions your dealership to scale.

Learnings from a live conversation between Andy Campbell and Bob Ohnemus, Commercial Business Manager, AgRevolution.

Find the whole conversation in the recorded on-demand webinar.

Why the lessons in this playbook matter

Nothing in a dealership sells until someone hands the customer a number. Yet quoting is often the slowest, least-measured step in the sales process. And it's the stage where deals tend to quietly stall.

This guide turns one dealer's hard-won lessons into moves any dealership can start this week, whatever system you're on today.

"Nothing will ever get sold without the quote. Nothing goes anywhere until we can hand them that number."

— Bob Ohnemus,
Commercial Business Manager, AgRevolution

The six moves suggested for dealers:

1. **Treat speed as a sales strategy:**
   Win the deal before a competitor plants their flag.
2. **Kill the handoffs & re-entry:**
   Work toward one screen, not multiple separate logins.
3. **Protect margin with accuracy:**
   An inaccurate quote eats margins and comes out of your pocket.
4. **Measure coverage & close rate:**
   The activity metrics that precede market share.
5. **Make aging & loss reasons visible:**
   Turn the sales pipeline into a coaching tool.
6. **De-risk the rollout (and start now):**
   The change is smaller than you think.

Six moves to make quoting your advantage

1 Treat quoting speed as a core sales strategy

Every day a quote sits open is an opportunity for your competitor to get in front of your customer. Dealerships like **AgRevolution** deliberately lean toward getting a strong number back fast, since the dealer to respond first usually controls the deal.

> *"The longer a deal gets, the uglier the deal gets. We lean toward speed because it keeps a competitor from getting in there and setting their flag."*
> — Bob Ohnemus, AgRevolution

DO THIS NOW:

- [ ] Set a target turnaround for a quote; AgRev aims well under 24 hours, and track the deals that blow past it.
- [ ] Aim to get the quote close to right the first time, since more than one round erodes customer trust.

2 Kill the handoffs and the re-entry

AgRev's quoting once ran on emailed trade photos and a two-step approval where work passed person to person, with data re-keyed at each stop. Every handoff added delay and a chance for error. The fix is a single workflow where customer, trade, financing, and warranty data are entered once and reused.

> *"If I'm doing a quote for this customer, why do I have to re-enter all the same data for a finance deal? We need the system to do that for us."*
> — Bob Ohnemus, AgRevolution

DO THIS NOW:

- [ ] Map your quote's path from start to finish and count the handoffs and duplicate data entries. Each one of these is a target to refine.
- [ ] Consolidate toward a single system so reps aren't logging into six sites to build one quote. **A quoting workflow tool like Anvil Pro** is built to collapse those steps into one screen.

3 Protect margin by protecting accuracy

Speed only helps if the number is right and a mismatched quote ultimately comes out of your pocket. Manual math and spreadsheet formulas on $300K+ machines leave too much room for margins to be eroded.

> *"If they're wrong, where does that money come from? It won't come from the customer; it's going to come out of our pocket."*
> — Bob Ohnemus, AgRevolution

DO THIS NOW:

- [ ] Spot-check quoted margin against final invoiced margin. If they don't match, find where the erosion happens.
- [ ] Move complex items (packages, finance, PDI, trades) off manual math and into a system that calculates them consistently.

4 Measure coverage and close rate

You can't improve what you don't measure. AgRev's two priority quote metrics are **close rate** ("Of all the deals we quote, how many do we win?") and **coverage** ("Of the units in our market, how many did we actually quote?").

Coverage is an activity metric you control and a leading indicator of market share. Underlining its importance, AGCO now asks AgRev for these numbers directly.

DO THIS NOW:

- [ ] Define your addressable market per territory, then track what share of it your team quotes, won or lost.
- [ ] Put coverage and close rate on a rep scorecard so performance is visible beyond raw sales dollars.

5 Make aging and loss reasons visible

When every open deal shows how many days it's been sitting, the pipeline becomes a coaching tool. A stalled quote prompts the right question: "What's the obstacle, and what can I remove?" Capturing why deals are lost matters just as much: one loss is an anecdote, but a year of loss reasons is a pattern you can take to your OEM or use to change how you price.

DO THIS NOW:

- [ ] Review an aging report of open quotes in every rep one-on-one; treat a stalled quote as a prompt to unblock, not to scold.
- [ ] Make a required "reason for loss" field part of the process since it's the input coverage and OEM conversations depend on.

6 De-risk the rollout, and start now

The most common objection to a new quoting system is change management. AgRev met less resistance than expected by putting high-volume reps on the design-and-test team early, allowing them to catch real issues and become internal champions. A short training, a brief dual-run, then a firm cutover date was enough. Bob's advice: don't wait for a busier market to make the time disappear.

> *"If you're going to do it, bite the bullet and do it. Now's as good a time as any; the market starts to climb and you'll run out of time."*
> — Bob Ohnemus, AgRevolution

DO THIS NOW:

- [ ] Recruit two or three of your busiest reps to pressure-test the workflow before rollout.
- [ ] Set a hard cutover date after a short overlap period; running two systems indefinitely is harder than switching.

Where Tractor Zoom's Decision Intelligence fits

Every move above depends on real-time data and a workflow that removes friction. **Tractor Zoom Pro** puts current, data-backed equipment values behind every trade and appraisal, while **Anvil Pro** gives your team the quoting workflow, aging visibility, and coverage reporting to run this playbook day to day.

Put the Playbook to Work

See how Tractor Zoom's Decision Intelligence tools, Tractor Zoom Pro and Anvil Pro, help your team quote faster, price with confidence, and protect margin.

Learn More