

Customer Story

How R.B. Akins Modernized Quoting and Gained Full Sales Visibility with ROM

R.B. Akins is a 53-year-old independent manufacturer's representative serving Oklahoma City and the surrounding region. The firm represents a comprehensive portfolio of applied HVAC, hydronics, air distribution, and electrical equipment, working at the intersection of manufacturers, contractors, and engineers in the commercial construction market.

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The Challenge

The Cost of Manual Quoting

Like many rep firms that have operated successfully for decades, R.B. Akins had built its quoting process around familiar tools: Microsoft Excel and Word. While functional, this approach created persistent friction as the team scaled.

"We had a very difficult time ensuring that quoting documents were stored in the proper places for collaboration and visibility. Our existing processes made quoting very tedious and troublesome." – Matt Akins, Sales Engineer, R.B. Akins

Key pain points included:

- Difficulty storing and locating quoting documents in consistent, accessible locations
- Poor cross-team collaboration and limited visibility into active quotes
- Tedious, error-prone manual processes that slowed every quote
- No standardized quote templates or consistent verbiage



The Evaluation

Why Rep Order Management?

R.B. Akins explored several options before landing on ROM, including custom software builds, a path that quickly revealed itself to be impractical in terms of time, cost, and complexity. ROM stood apart because it was **purpose-built for exactly what rep firms do every day.**

"ROM was, out of the box, made for us," said Matt Akins. "After several meetings with implementers, we were worried that standing up a custom software platform would never be attainable. ROM was the silver bullet!"

Implementation proved equally smooth. The platform's intuitive interface and responsive support team made the transition manageable, even when overhauling a 20-year-old internal workflow.



The Implementation

Real-Time Collaboration and Standardized Quoting

Since going live on ROM, the R.B. Akins team has experienced a meaningful shift in how they work together and serve their customers:

"Collaboration is #1 for us. It is now so simple to see what everyone is working on and what customers we are touching, not to mention streamlining our sales meetings." — Matt Akins, Sales Engineer, R.B. Akins

- **Real-time collaboration:** Every team member can instantly see what colleagues are working on and which customers are being engaged.
- **Streamlined sales meetings:** Data is always current, making internal reviews faster and more productive.
- **Quote templating:** Products can be templated and equipment duplicated across jobs, eliminating redundant data entry.
- **Consistent output:** All quotes now go out in a standardized format with common verbiage, projecting a professional, unified brand.

The Impact

Unlocking Business Intelligence

Eight months into full deployment, the **business intelligence** being generated by ROM is just beginning to reveal its full potential. With quoting data accumulating over time, R.B. Akins expects to unlock deeper insights into win rates, product mix, and customer activity, insights that were simply unattainable with spreadsheets.

"Now that we are 8 months into full rollout, the data is really stacking up. It is going to open up insights into our quoting activity we could not have imagined before," said Akins.

For a firm that's been operating successfully for more than five decades, ROM isn't replacing what worked, it's removing the friction that held back what comes next.




About R.B. Akins

R.B. Akins has served the HVAC industry since 1972, building a reputation for quality equipment and responsive service over more than five decades. The Oklahoma City-based firm represents leading manufacturers across applied HVAC, hydronics, air distribution, and electrical equipment, working at the intersection of manufacturers, contractors, and engineers in the commercial construction market. When challenges arise, the **R.B. Akins** team aims to be part of the solution.

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