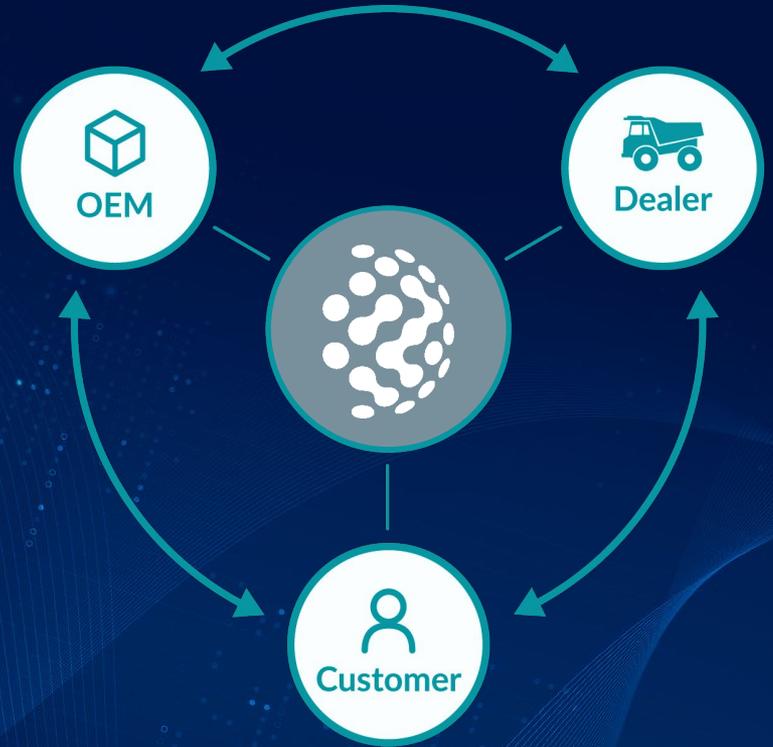




# VizaLogix

The Ultimate Front-End  
Business Solution for Equipment,  
Truck & Ag Dealerships





# Turn Operational Gaps Into Revenue Gains

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VizaLogix helps equipment, truck & ag dealerships eliminate inefficiencies, capture missed service and sales opportunities, and grow the bottom line so you can drive more revenue from existing operations. Our tools connect dispatch, inspections, CRM, and remote diagnostics together—giving your team the visibility and control they need to work faster, sell smarter, and grow without adding headcount.

# About Us

## Our Vision

We help your dealership grow by turning everyday operations into revenue-generating opportunities. With intelligent tools purpose-built for sales and service teams, our platform eliminates inefficiencies, captures missed revenue opportunities, and drives measurable ROI—fast.

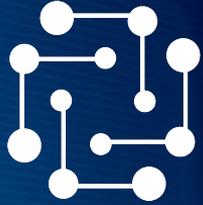
## Our Approach

Every business is unique, which is why we tailor our solutions to meet your specific needs. We work closely with our customers to deliver personalized tools, expert guidance, and ongoing support. From initial implementation to long-term success, VizaLogix is committed to being your partner at every step of the journey.



## INTELLIGENT DATA-DRIVEN





# Equipment Lead Management

Bobcat Parker  
+14074013400  
parker@bobcat.com

Fiscal Purchases this year: \$564,800

Sales Rep: Byron Lafferriere

Contacts Machine List Sales Leads Service Leads Quotes Connect History

**\$1,756,400** Created Quotes  
**\$1,211,600** Pending Approval  
**\$0** Expired Quotes  
**\$544,800** Approved

LEAD ID	QUOTE ID	MODEL	CREATED DATE	AMOUNT	DESCRIPTION	STATUS	ACTIONS
116	511	T77	04/01/2025, 1:30:22 pm	\$19,800		APPROVED	
319	429	T77	03/13/2025, 2:21:57 pm	\$230,000		PENDING	
114	415	T77	03/10/2025, 3:57:31 pm	\$501,600		PENDING	
21	405		03/03/2025, 4:22:25 pm	\$525,000		APPROVED	
20	404		03/03/2025, 4:15:31 pm	\$480,000		PENDING	
182	403	T97	03/03/2025, 3:59:22 pm	\$0		PENDING	

8:39 Messages

VizaLogix

Equipment Lead Mgmt / Reports

Reports - 03/04/2025 to 04/03/2025

13 Total Leads

4 Opportunities

11 Quotes

\$344,340 Closed/Won

12:45

Quoted By: Byron Lafferriere

Payment Terms: 30 day(s)

Invoice Date: 02-Apr-2025 12:44 PM

Invoice To: Bobcat Parker, 18562 Pony Express Dr., Parker, CO 80134, USA, +14074013400

Ship To: Bobcat Parker, 18562 Pony Express Dr., Parker, CO 80134, USA, +14074013400

Contact Name: Rob Parker

Ship Via:

Notes:

Line Items:

- 2025 L180H EV - Loader  
1 x \$282,000.00 \$282,000.00
- 8 Pronged 12.5 Ton Bucket - Attachments  
1 x \$18,500.00 \$18,500.00

Subtotal: \$300,500.00  
Discount: \$0.00  
Tax (8%): \$24,040.00  
Total Amount: \$324,540.00

Approve Equipment Sales Quote

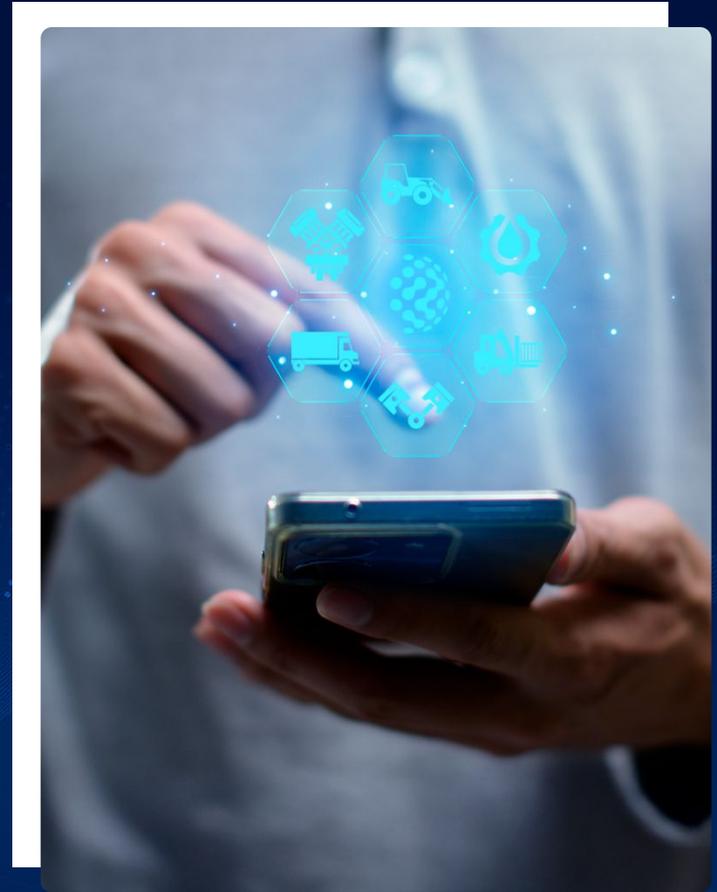
4 Contacts  
46 Lead History  
19 Days In Funnel  
15 Days In Current Stage  
6 Machines

# Why Equipment Lead Management Was Created For Dealers

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Legacy CRMs weren't made for Truck & Equipment dealerships who manage complex service workflows, asset data from multiple OEMs, and demanding equipment customers. ELM was purpose-built for Dealerships like you—we believe your CRM shouldn't be your bottleneck.

- Built specifically for heavy equipment, ag & commercial truck dealerships
- Works with all major OEMs to collect real-time equipment and diagnostic data
- Transforms telematics, oil/fluid analysis, and inspection data into qualified sales leads
- Surfaces revenue opportunities your current CRM can't see



# Your Current CRM Isn't Built for Your Dealership Needs

Traditional CRMs miss the data that actually matters - machine health, usage, and service triggers - leaving revenue on the table that you are missing.

- Disconnected from service and asset data
- No visibility into machine health, usage, and parts
- Manual lead entry and follow-up
- Missed revenue opportunities sitting in your equipment data



# The Purpose-Built Revenue Generating Engine For Your Dealership

Equipment Lead Management doesn't just track customer touchpoints - **it connects directly to your equipment and turns insights into income.**

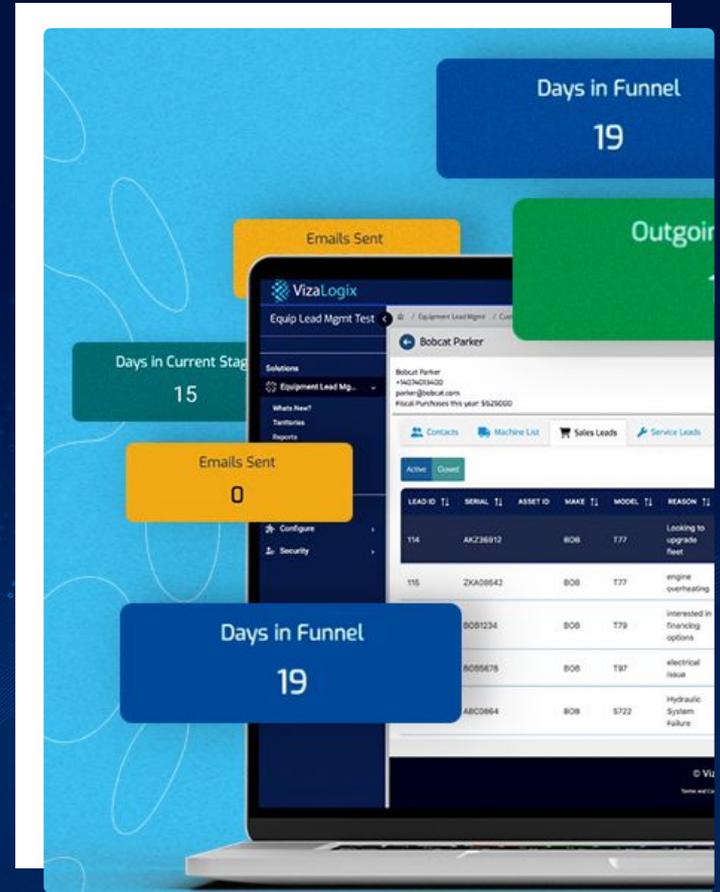
- Aggregates data from multiple OEMs and asset platforms
- Identifies trends in machine usage, diagnostics, and wear
- Automatically triggers sales and service opportunities
- Integrates with your existing DMS, telematics, and ERP
- End to End communication portal for live chat, text, and email between customers and internal employees within your CRM



# How ELM Works: From Asset Alert to Closed Deal

ELM streamlines the entire process from connected asset alerts to real dealership action—automatically identifying opportunities, creating leads, and enabling your team to respond with speed and accuracy.

- Collects data from equipment telematics, fluid/oil analysis, fault codes, and electronic inspections
- Analyzes trends in machine behavior and health
- Creates lead alerts for sales and service teams
- Enables instant follow-up, quoting, and appointment setting
- Pipeline & Funnel management for forecast accuracy



# All the Tools You Need to Turn Your Data Into Dollars

- Multi-OEM data aggregation
- Lead scoring and auto-creation
- Workflow automation for sales and service
- Customer communication & self-service portal
- Quoting and opportunity tracking
- ERP + DMS integration

Equipment Lead Management brings lead management, customer engagement, and operational insights in one purpose-built CRM platform.



# ELM Drives Real Revenue For Your Dealership

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- Surface leads hiding in your operation that your team may not even know exist.
- Identify service needs before customers call.
- Turn proactive maintenance into upsell opportunities.
- Boost technician utilization through better forecasting.
- Increase machine sales through lifecycle insights.

ELM empowers your team act on real buying signals hidden in your machines—before your competition does—by turning service data, usage trends, and diagnostics into clear, actionable opportunities.





# Why Dealers Are Making The Switch To Equipment Lead Management

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ELM is designed specifically to grow your dealership - with fast deployment and high ROI from day one.

- Built for equipment & truck dealerships—not adapted
- Integrates seamlessly with your current tech stack
- Deploys in days—not months
- Drives ROI from week one

If you're ready to turn connected data into a competitive advantage, ELM is the CRM built to get you there.



# Ready to See Equipment Lead Management in Action?

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## Let's Turn Your Equipment Data Into Dealership Growth

- Book a 30-minute walkthrough tailored to your team
- Let's calculate your dealership's revenue opportunity together

[Click Here to Schedule Your Equipment Lead Management Demo Today](#)

Schedule a quick walkthrough and see how fast you can start generating revenue from your connected assets.



VizaLogix

[www.vizalogix.com](http://www.vizalogix.com)