

 Lobel Financial, an auto finance company serving dealerships nationwide since 1977, needed to modernize their field operations when their existing Salesforce setup proved inadequate.

Partnering with Squaro and SPOTIO, they overhauled their sales processes and improved operational efficiency. The streamlined approach strengthened dealership relationships and delivered a 4X increase in funded loans within eight months.



Anaheim, Ca



Auto Finance



B2B



lobelfinancial.com

 **The Challenge****Limited Field Sales Visibility**

Lobel Financial had no way to verify field rep visits or correlate activities with results. Management operated on trust, creating blind spots in territory performance.

**Fragmented Territory Management**

Territory assignments lacked analytical rigor, with reps often located far from dealer clusters, reducing efficiency and coverage.

**Lack of Performance Analytics**

Limited visibility into KPIs hindered Lobel Financial's ability to set goals and identify coaching opportunities.

 **The Solution****Squaro + SPOTIO Implementation**

Strategic partnership with Squaro for territory redesign using advanced analytics, then implementation of SPOTIO for GPS-verified visits and data for comprehensive reporting.

**Data-Driven Territory Optimization**

Created detailed territory maps using zip code groupings and dealer cluster analysis to maximize daily visits and ensure consistent coverage.

**Comprehensive Reporting Platform**

Implemented daily performance reports with goal setting, commission management, and data-driven coaching protocols

## Game-Changing Results

### Operational Excellence That Actually Works

Lobel Financial discovered what every successful field sales team knows: consistent dealer engagement drives consistent results. Skip the touchpoints, and applications dry up. Stay connected, and the pipeline stays full.

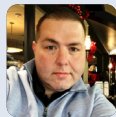
### The Numbers Tell the Story:

- ▶ 4X growth in funded loan volume within 8 months
- ▶ 95%+ visit verification with SPOTIO's custom GPS tracking
- ▶ 100% adoption rate among the sales organization
- ▶ Optimized territories based on real market data
- ▶ Seamless deployment across entire field sales organization
- ▶ Major cost savings compared to rebuilding their Salesforce system or other CRM solutions

### Culture Transformation in Action:

SPOTIO's data availability and GPS tracking features gave Lobel unprecedented insight into their field operations. No more guesswork about territory performance or expansion opportunities; just clear data driving smart decisions about dealer coverage and geographic growth.

Having real data to coach the team meant no more subjective performance conversations. "For the people who are working really hard, performance tracking allows them to shine," said Squaro CEO Eli Boy. With improved visibility, managers can identify which reps need support through ride-alongs or additional training, giving every rep the tools to excel in the field.



**Jason Oswald,**  
Chief of Sales and Marketing,  
Lobel Financial

The data has been paramount in verifying the sales reps' activities and allowing us to focus on improving the product or process if the results are not as expected. We have to inspect what we expect, and ensure the sales reps are actually doing the required outreach. We have learned the right number of touches that we need and what that cadence should be.



**Squaro**  
Business Intel

Squaro is a performance platform that helps teams & organizations increase productivity, strengthen accountability, and hit their goals without the guesswork.

## 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.