

Alltracon - Go To Market Revamp

Alltracon

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Quote created by: Daniel Kurt

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Comments from Daniel Kurt

Introduction

My team and I look at companies and their HubSpot implementations through a lens that identifies friction between internal teams and team members in their interactions with one another as they work to serve customers, and in terms of customers facing friction in their interactions with the company.

We do this by first documenting how you are currently combining your people, processes, technology, and data to produce revenue, all while identifying and documenting the areas of friction. We then identify required changes and refinements needed to remove that friction.

Lastly, we execute those changes and refinements while keeping in mind that you and your team have your day-to-day responsibilities and we must calibrate the work to ensure our pace is measured and sustainable.

You want to grow, but if you do not first remove friction, any attempt to grow may result in the opposite outcome while you and your team burn yourselves out.

Current State

- Alltracon has two main business lines: rigging/plant relocation and millwright service/maintenance. Recurring millwright service accounts for 30-45% of revenue and constitute your bread and butter revenue.
- Ad spend was driving a lot of leads, but was shut down on advice to transition fully to HubSpot. This negatively impacted lead gen.
- Main HubSpot users are the sales team and Chris who handles data cleanup. The use of HubSpot is uneven, and many HubSpot features remain unused, underutilized or misused. Examples include:
 - Unused features: Sales sequences for automated yet personalized prospecting, and using HubSpot Quotes.
 - Underutilized features: Proper segmentation, automation of key processes and notifications, and reporting that provides insight on current state and helps holds team members accountable.
 - Misused features: The sales pipeline having post-sales process stages, making it difficult to report on the actual sales process.
- Alltracon is shifting focus to larger enterprise clients for more recurring business.
- There is currently no dispatch software in place.

Objectives & Key Results

Objective:

Our ultimate objective is to enable Alltracon to grow revenue and profit by methodically expanding accounts and acquiring new accounts for your recurring millwright services, while continuing to generate leads and pipeline for your rigging/plant relocation services.

With our methodology, we are going to set up the foundation that will allow your team to efficiently identify and target accounts with the highest revenue potential by aligning sales and marketing. The outcome of this project will be a sustainable revenue engine that will allow you to efficiently expand upmarket and generate more recurring revenue.

Key Results:

- Re-architect your data model in order to properly segment customers via Smart Lists based on industry, project/service type purchased, revenue generated, and firmographics.
- Profile top customers in each segment and define your Ideal Customer Profile.
- Enable your sales team to sell more by providing more qualified leads and processes. To do this, we also need to hold them accountable by tracking all sales-related activities as automatically as possible.
 - Determine if we should be doing more business with current customers based on their industry and what they have and should purchase. Create an account expansion plan and implement.
 - Use Apollo.io or similar to build a Target Account Lists of similar companies to your profitable customer base (enterprise) and enable your sales team to begin prospecting.

Required Work to Achieve Objective and Key Results

Business Mapping and Resulting Actions

- **People:** Org chart with definition of roles and responsibilities.
- **Processes:** Flow chart of your Go To Market and key processes from lead generation and qualification, sales processes, post-sales processes, and back-office processes.
 - Identify updates to current processes, or new processes required, and implement.
- **Systems/Technology:** Refine the tech stack and ensure everything is integrated and set up properly.
 - We need to get your email working ASAP.
 - Consider switching to Google for Work (Gmail) as a replacement to Outlook so that that we achieve a better integration with HubSpot, and better usability. We will advise on this and will help you as you do the work. We have identified a solution that will streamline this process. In the unlikely event that additional help is needed, we will help find a subject matter expert to assist.
 - Incorporate Apollo.io as a database to facilitate current account expansion and the identification and outreach to new accounts that match your Ideal Customer Profile.
 - Audit and refresh your current HubSpot implementation - delete unused items (lists, workflows, etc), refine the sales pipeline stages as required, and handle other tasks to ensure your portal is setup with best practices.
 - Dispatch software is not in scope of this initial project.
- **Data:** Review/refine data model within HubSpot and ensure it is clean, insightful, and actionable.
 - A huge part of this is better defining your Ideal Customer Profile (ICP) to ensure your team will be barking up the right tree in their prospecting efforts.
 - Direct the team to update current Company and Contact records based on the refined data model to ensure the data is in a state for us to have proper, insightful, and actionable segmentation.

- Implement data governance to ensure the data remains clean, insightful, and actionable as your team continues to use HubSpot.
- Build reports and dashboards that make sense of all of the above, and provide input on next steps.

Process Training and Documentation

- We will provide written Standard Operating Procedures for all key processes we create.

Project Timeline

- From project signing, we will assist you with getting your email up and running.
- The project will start in earnest on April 1st and will end on June 30th.

Collaboration

- We will meet weekly at the same time and day via Zoom.
- Ad hoc meetings will be scheduled as required.
- We will organize your tasks, due dates, and communication via our project management software, Asana.

ROI Calculator

Based on your average deal size, it will not take very many incremental orders to more than pay for this investment. The work that we're providing will be durable and will continue to pay dividends after this initial engagement. My team and I are committing to achieving these objectives and key results and will work on your business as if it was our own.

Products & Services

| Item & Description | Quantity | Unit Price | Total |
|--|----------|-------------|-----------------------------|
| Go to Market Revamp and HubSpot Portal Audit/Refresh Project | 1 | \$15,000.00 | \$15,000.00 for 3 months |
| One-time subtotal | | | \$15,000.00 |
| Total | | | \$15,000.00 |

Purchase terms

Payment shall be made via ACH or paper check.

1/3 due at signing

1/3 due on May 1


1/3 due on June 1

Signature

Before you sign this quote, an email must be sent to you to verify your identity. Find your profile below to request a verification email.

Tiffany Patterson

tiffany@alltracon.com



[Signature]

Payment Schedule

| Name | Due date | Amount |
|-----------|--------------|----------------------|
| Payment 1 | Upon receipt | \$5,000.00 (Due now) |
| Payment 2 | May 1, 2024 | \$5,000.00 |
| Payment 3 | June 1, 2024 | \$5,000.00 |

Questions? Contact me



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