STUDENT INTERNATIONAL BUSINESS COUNCIL

Fall 2020

salesforce

Team Introduction

- **Team Introduction**
- Discovery
- Demo
- Recap
- Experience with Trailhead

Discovery
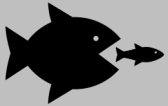
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Overview

Industry

Competitors
- Great Dane (10.9%)
- Utility Trailer Manufacturing (10.4%)

Market Share
- 13.2%
- 1/3 of top 100 for-hire fleets purchase its products

Recent Trends
- Rising cost of diesel fuel
- Growing demand in Canada and Mexico
- Weakening of EPA Regulations

Current Process

- No centralized platform
- Sales reporting "word of mouth"
- Sales decisions based on "gut feeling"

Complaints

- Inefficient spending on customers
- Lack of comparison capability between leads
- Current sales data hard to access on the road

Wabash is a major player within the tractor-trailer industry and its current sales system lacks a central platform.

Pain Points

Data Consolidation

Data is spread across numerous platforms leading to confusion

Basic questions about accounts can't be answered quickly

Optimization

Sales forecasting currently doesn't exist

Inability to compare similar leads

Accessibility

Lack of a mobile platform

Cannot access sales data quickly

The three main pain points being tackled are data privacy, optimization, and accessibility.

Demo

- Team Introduction
- Discovery
- Demo
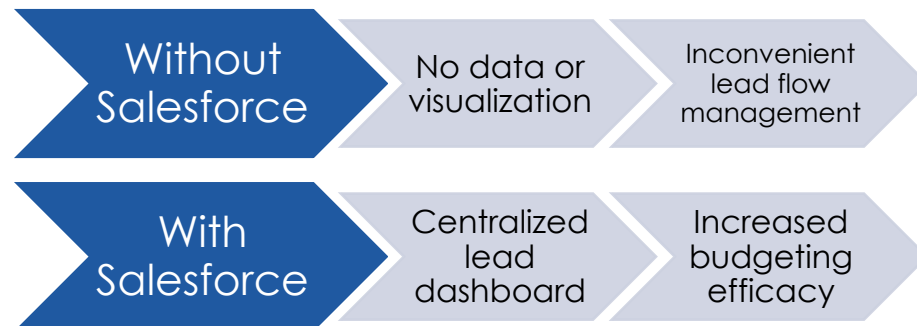- Recap
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Sales Manager Dashboard

New Leads

First Name ↑	Last Name	Company / Account
Andy	Young	Dickenson plc
Bertha	Boxer	Farmers Coop. of Florida
Betty	Bair	American Banking Corp.
Bill	Dadio Jr	Zenith Industrial Partners
Brenda	Mcclure	Cadinal Inc.

Available Accounts

Account Owner ↑	Account Name	Type
Maggie Brown	Werner Enterprises, Inc.	Truckload Carrier
Maggie Brown	Covenant Transport	Truckload Carrier
Ray Kman	Grand Hotels & Resorts Ltd	Truckload Carrier
Ray Kman	Edge Communications	Truckload Carrier
Ray Kman	United Oil & Gas Corp.	Truckload Carrier

Lead Comparison

| Without Salesforce | No data or visualization | Inconvenient lead flow management |
| With Salesforce | Centralized lead dashboard | Increased budgeting efficacy |

Data Interface

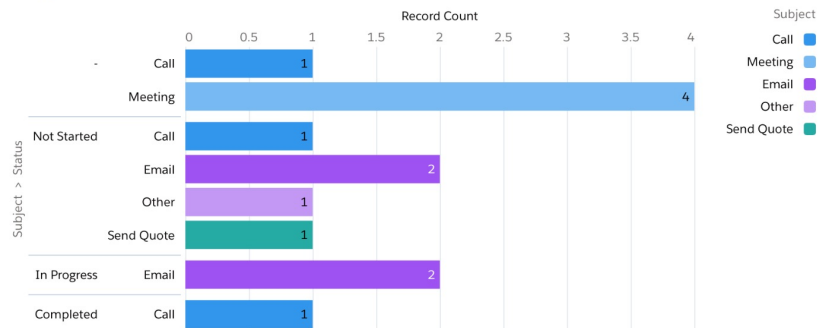| Without Salesforce | Word-of-mouth forecasting | Inconsistent spending |
| With Salesforce | Main account interface | Easier sales manager access |
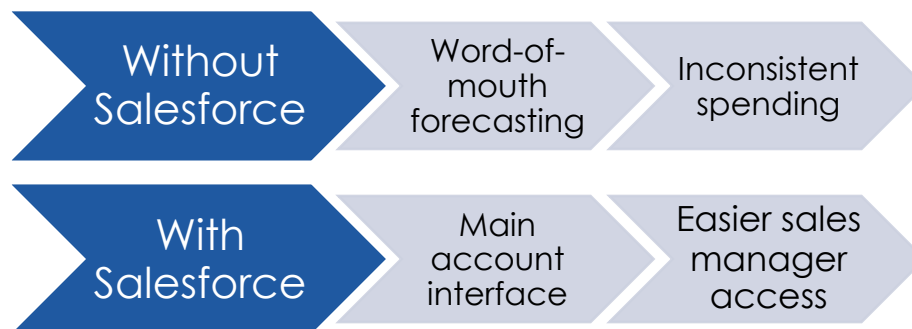
The Sales Manager Dashboard has alleviated the customer relations pain points in Wabash with the easy-to-understand data interface layout, and a more centralized lead comparison
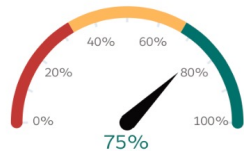
Sales Rep Dashboard

Accessibility

Visual Analytics Tools

- Intuitive, clear visual representations of sales performance

- Provides a clear pipeline to current opportunities

Data Privacy

Visibility Customization

- Sales Reps have limited access to sales data

- Individual opportunities, tasks, and win rates help sales reps keep track of their sales performance

Sales Rep dashboard addresses accessibility and data privacy concerns by offering visibility customization features as well as visual representations of key performance indicators.

Sales Console Demo

Today's Events

4:30 PM	**Meeting**
	Averitt Express Headquarters
	10/27/2020 5:30 PM

View Calendar

Recent Records

- Sales Rep Group
- November Sales
- Averitt Express, Inc.
- Opps Pipeline
- Sales Manager Dashboard

View All

My Tasks

☐	Email	**Oct 17**
	Werner Enterprises, Inc.	
☐	Email	**Oct 21**
	Dominic Brown · Werner Enterprises, Inc.	
☐	Other	**Oct 21**
	Dominic Brown · Werner Enterprises, Inc.	
☐	Email	Tomorrow
	Dominic Brown · Werner Enterprises, Inc.	
☐	Email	Oct 29
	Joseph Miller · Averitt Express, Inc.	

View All

Key Deals - Recent Opportunities

November Sales
Averitt Express, Inc. · 11/30/2020 · $40,000.00

October Sales
Averitt Express, Inc. · 11/24/2020 · $50,000.00

Duraplate HD
Averitt Express, Inc. · 10/31/2020 · $400,000.00

Dry Freight Truck Bodies

Sales Console Demo – Chatter Group

Sales Console Demo - Streams

Sales Console Demo – Account

Sales Console App

Visibility

View of daily calendar and tasks

↓

Emphasis on urgent and overdue events

Information Accessibility

Access to rep's accounts and opportunities

↓

Ability to update information based on daily sales

Communication

Chatter
- Post updates, polls, and questions between reps and teams

Streams
- Follow activity of custom record and account lists based on current assignment
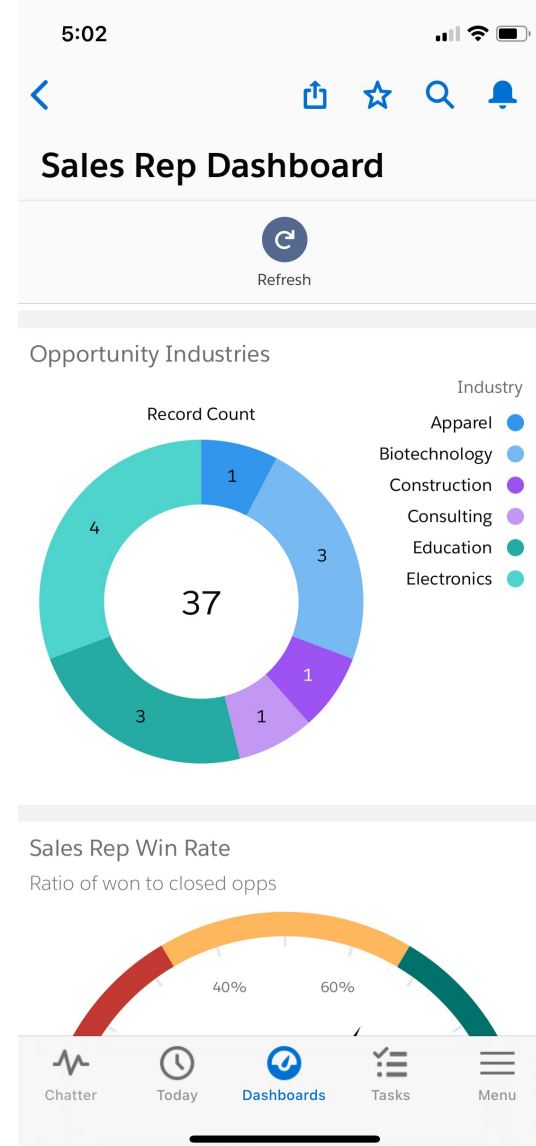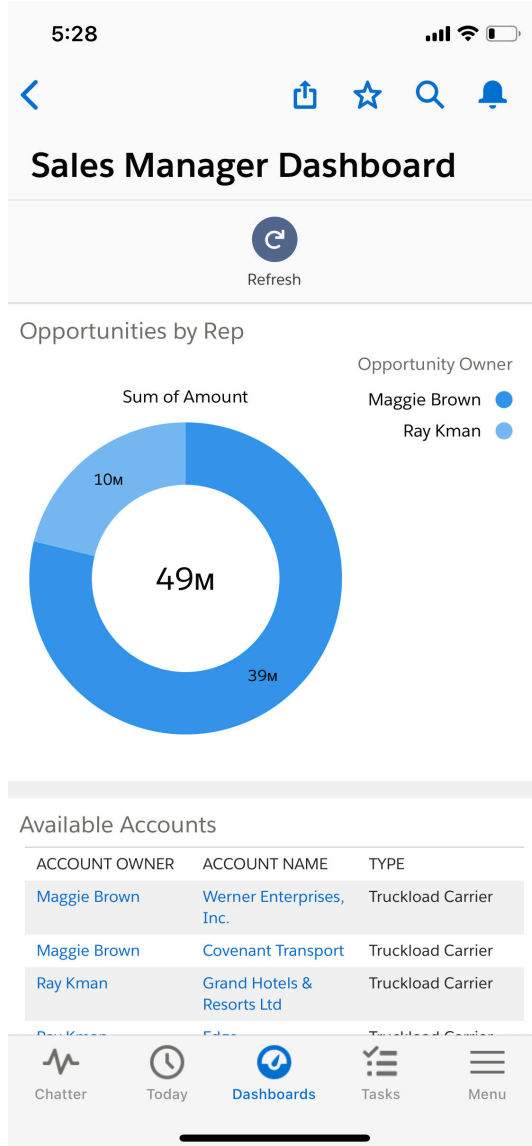
Groups
- Join reps in private teams to ease and secure communication

The main pain points addressed by the Sales Console app are visibility, information accessibility, and communication.

Mobile Demo

Mobile Demo

Sales Manager Dashboard — mobile screenshot showing "Opportunities by Rep" donut chart (49M total, 10M and 39M segments, Opportunity Owner: Maggie Brown, Ray Kman) and "Available Accounts" table.

ACCOUNT OWNER	ACCOUNT NAME	TYPE
Maggie Brown	Werner Enterprises, Inc.	Truckload Carrier
Maggie Brown	Covenant Transport	Truckload Carrier
Ray Kman	Grand Hotels & Resorts Ltd	Truckload Carrier
Ray Kman	Edge	Truckload Carrier

Sales Rep Dashboard — mobile screenshot showing "Opportunity Industries" donut chart (Record Count 37) with Industry legend: Apparel, Biotechnology, Construction, Consulting, Education, Electronics; and "Sales Rep Win Rate — Ratio of won to closed opps" gauge.

Mobile Demo

Mobile Demo

Addressing Pain Points

Accessibility	Sales information can be accessed without a laptop	Seamless integration of dashboards into mobile	Input sales information quickly to the cloud
Data Consolidation	Reps all see the same sales information	Changes made on mobile are reflected in the cloud	Information not lost when reps leave

Further Areas of Improvement

Rep Specific Dashboards

Screen time Mobile vs Desktop

Custom Reporting Apps

The mobile solution ensures sales reps can quickly access or input sales data into a centralized cloud database.

Recap

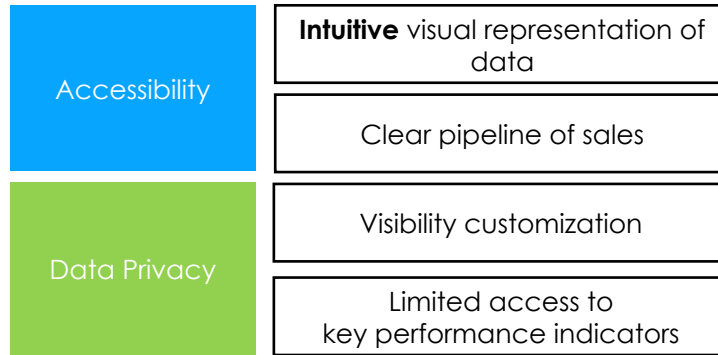Team Introduction

Discovery

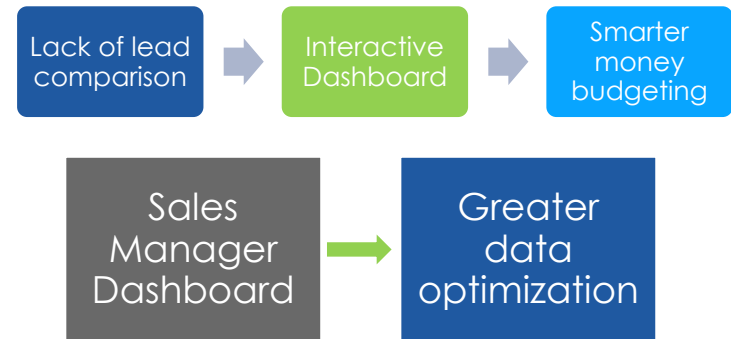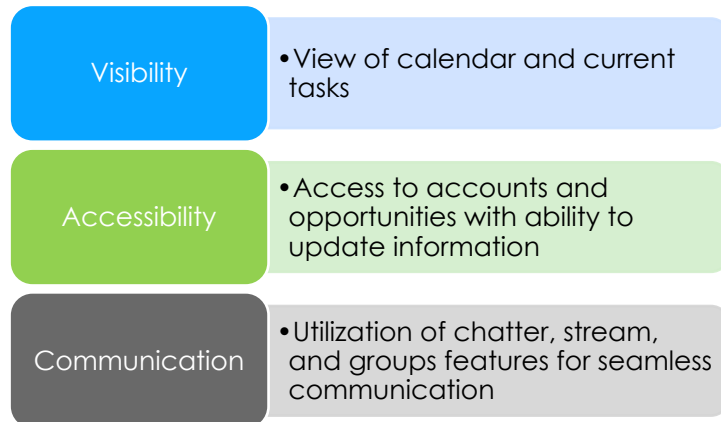Demo

Recap
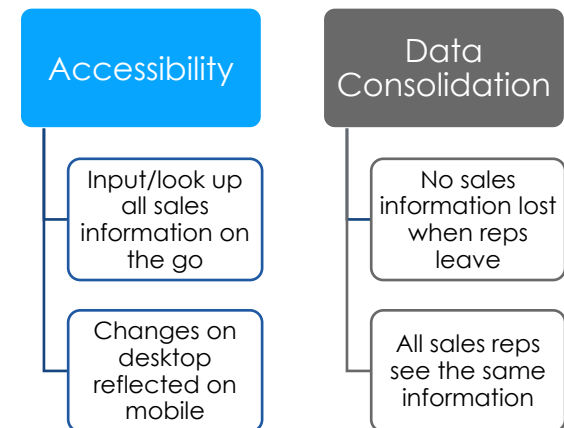
Experience with Trailhead

Recap

Sales Rep Dashboard

Accessibility	**Intuitive** visual representation of data
	Clear pipeline of sales
Data Privacy	Visibility customization
	Limited access to key performance indicators

Sales Manager Dashboard

Lack of lead comparison → Interactive Dashboard → Smarter money budgeting

Sales Manager Dashboard → Greater data optimization

Sales Console App

Visibility	• View of calendar and current tasks
Accessibility	• Access to accounts and opportunities with ability to update information
Communication	• Utilization of chatter, stream, and groups features for seamless communication

Mobile

Accessibility
- Input/look up all sales information on the go
- Changes on desktop reflected on mobile

Data Consolidation
- No sales information lost when reps leave
- All sales reps see the same information

Experience with Trailhead

Team Introduction

Discovery

Demo

Recap

Experience with Trailhead

Experience with Trailhead

Trailhead	Trailblazer Community

Trails provide guided learning paths

"Answers" feature allows feedback from peers

Trail-mixes create custom playlists

"Help" feature presents guided solutions to questions

Modules enable specialty skill development

App-exchange shares inspiration for custom apps

Trailhead includes several features that have enabled us to learn essential skills to create an efficient and effective CRM platform for Wabash National.

Thank you!

QUESTIONS?