Final Group assignment - B2B sales in Tech

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Connecteam

1. **Ideal Customer Profile (ICP) -**

   Connecteam's ideal customers are small to mid-sized businesses (30–5,000 employees) operating in industries with a large deskless or frontline workforce. These organizations typically:

   - Manage operations across multiple locations or shifts.
   - Face difficulties in real-time communication, scheduling, training, and task execution.
   - Use manual or fragmented tools like Excel, WhatsApp, or paper processes.
   - Need a scalable, mobile-first solution that is easy to adopt and doesn't require IT or complex integrations.

   1. **Target Industries:**

Industry	Customer Value Potential	Rationale
Security Services	very high	High compliance demands, 24/7 operations, complex scheduling, and dispersed teams.
Hospitality	high	Large hourly workforce, shift-based roles, strong need for service consistency.
Public Transportation	High	Mobile workforce across multiple depots requires real-time scheduling and compliance tools.
Cleaning Services	high	Mobile staff, task tracking challenges, and documentation are critical for clients.
Food Retail / QSR	Medium-High	High volume of shifts, low margins,

		frequent turnover, and limited tools adoption.
Food Production & Distribution	Medium-High	High volume of operations and a spread-out workforce demand centralized scheduling and tracking systems.
Moving & Logistics	Medium	Requires task coordination and time tracking, but with lower compliance risks.

2. **Key Buyer Personas:**

Persona	Responsibilities
Operations Manager	Shift scheduling, task coordination, field ops
HR Manager / Talent Lead	Onboarding, training, engagement, and compliance tracking
Field Supervisor	Attendance, checklist compliance, and mobile team oversight
Franchise Owner / GM	Day-to-day operations, staff alignment across locations
COO / Director of Ops	Efficiency, visibility, cost control, process standardization

3. **Technology Stack & Maturity:**
   a. Commonly use Excel, WhatsApp, Google Sheets, or paper systems.
   b. Maybe experimenting with tools like When I Work or Deputy.
   c. Employees often use smartphones (via company-issued or BYOD).
   d. Do not use complex HRIS/ERP systems like SAP or Workday.
   e. Low technical barriers — need simple, intuitive software.

4. **The Pains Connecteam Solves:**

Pain Category	Pain Points
Scheduling	Missed shifts, over/understaffing, confusion between sites
Time Tracking	Time theft, inaccurate logs, payroll disputes

Communication	Field staff missing updates, no central messaging
Task Management	No visibility into execution, paper-based inefficiencies
Onboarding & Training	Inconsistent ramp-up, slow time-to-productivity, poor service levels
Compliance & Docs	No audit trail, missing documentation, high risk of regulatory penalties

5. **ROI (Return on Investment):**

Use Case	Pain Point	Financial Consequence
Time Tracking	Time theft, inaccurate punches	Overpaying for labor, payroll disputes
Shift Scheduling	Missed shifts, staffing chaos	Lost productivity, poor customer experience
Task Management / Forms	No tracking, lack of completion proof	Operational mistakes, regulatory fines, safety violations
Training & Onboarding	High turnover, poor ramp-up	Costs of lost hires, rehiring, and retraining

6. **Negative Impact of Not Solving These Pains:**
   a. High turnover due to poor onboarding and engagement
   b. Compliance violations from missing documentation
   c. Payroll errors and increased admin burden from manual processes
   d. Disorganized operations leading to lost revenue and service inconsistency
   e. Low employee morale from communication gaps and a lack of structure

7. **Use Case → Pain Mapping:**

Use Case	Pain Point Addressed
Employee scheduling	Missed shifts, scheduling confusion, overstaffing, or understaffing
Time tracking with GPS	Inaccurate time logs, time theft, payroll disputes
Real-time communication	Staff missing critical updates, policy changes not delivered
Mobile forms and checklists	Lack of accountability, delayed reporting, and paper-based inefficiencies
Training & onboarding modules	Slow ramp-up times, inconsistent service quality, and knowledge gaps.

So Why Connecteam Is a Perfect Fit:

Connecteam is designed for non-desk, non-tech-savvy teams, offering:

- One mobile app for scheduling, communication, time tracking and training.
- No IT overhead, no need for enterprise HR platforms.
- Start small (even free) and scale with growth.
- Centralized visibility + decentralized execution for managers and HQ

This positions Connecteam as a high-impact, low-friction solution for the exact needs of its ICP.

2. 10 Relevant Potential Customers That Match the ICP

1. **Angel Bakeries**
   a. Industry: Food Production & Distribution.
   b. Employees: ~1,800.
   c. Why It Fits: As Israel's largest commercial bakery, Angel Bakeries operates 32 outlets and distributes to over 6,000 stores and numerous hotels and army bases. Managing a vast and dispersed workforce requires efficient scheduling, communication, and task management solutions.
   d. Relevant contact persona: Nir Ben Yehuda - VP of Business Development.
   Ran Ronen - Chief Budgeting and Control Analyst

2. **Tnuva**
   a. Industry: Food Production.
   b. Employees: ~4,000.
   c. Why It Fits: Tnuva is a major dairy producer with multiple production facilities and distribution networks, requiring efficient coordination among a large, dispersed workforce.
   d. Relevant contact persona: Anat Gross Schon - Deputy CEO & Head of Business and Growth Division.
   Dvir Carmon - Finance and economics manager.

3. **Bar-Ilan University**
   a. Industry: Higher Education & Campus Operations.
   b. Employees: ~1,800.
   c. Why It Fits: As a large academic institution, Bar-Ilan University employs a wide range of non-desk staff across maintenance, security, and facility services. Managing these teams requires streamlined scheduling, task tracking, and communication tools to ensure efficient campus operations.
   d. Relevant contact persona: Maor Pinko - Chief Administration, Human Resources and Special Projects Officer.
   Arnon Zait - Chief Financial Officer.

4. **Isrotel**
   a. Industry: Hospitality (Hotels & Resorts).
   b. Employees: ~5,000.
   c. Why It Fits: Operating a chain of hotels across Israel, Isrotel employs a large number of frontline workers in housekeeping, maintenance, food service, and guest operations. Coordinating shifts, managing tasks, and communicating in real time across locations make Isrotel a strong candidate for mobile-first workforce management tools.
   d. Relevant contact persona: Sharon Helfenboum - Organizational Development and Instruction Manager.
   Golan Cohen - VP Human Resources

5. **Afikim**
   a. Industry: Public Transportation.
   b. Employees: ~2,000.
   c. Why It Fits: As one of Israel's largest bus companies, Afikim manages thousands of drivers, mechanics, and dispatch personnel across multiple depots. The nature of its operations requires efficient shift scheduling, mobile communication, and task tracking to ensure service reliability and regulatory compliance.

d. Relevant contact persona: Eran Monrov - VP Human Resources.
Shay Itzhakov - CFO at Afikim.

6. **Securitas UK**

   a. Industry: Security Services.

   b. Employees: ~4,500.

   c. Why It Fits: Providing security services across diverse sectors and locations, Securitas UK manages a large, mobile workforce of guards and response teams. Coordinating shifts, ensuring compliance, and maintaining communication with field staff make it a strong fit for a centralized, mobile-first workforce management solution.

   d. Relevant contact persona: Mark Coleman - CFO at Securitas UK.
   Sarah Hayes - Human Resources Director.

7. **Mitie Group**

   a. Industry: Facilities Management.

   b. Employees: ~4,000 (within target divisions).

   c. Why It Fits: Mitie Group delivers cleaning, maintenance, and security services across the UK through a dispersed, deskless workforce. Managing schedules, tasks, and real-time updates for field teams highlights the need for streamlined communication and operational tools.

   d. Relevant contact persona: Cijo Joseph - Chief Technology and Digital Officer.
   Kathryn Dolan - Position: Chief People Officer.

8. **Facility Solutions Group (FSG)**

   a. Industry: Construction & Energy Management.

   b. Employees: ~2,300.

   c. Why It Fits: FSG offers lighting, electrical, and energy management services across the U.S. Coordinating field technicians and project teams requires streamlined task management and real-time communication solutions.

   d. Relevant contact persona: Tom Riland - Chief Technology Officer.
   Chris Wemmert - Chief Financial Officer.

9. **Sigma Connected**

   a. Industry: Outsourcing Services.

   b. Employees: ~1,221.

   c. Why It Fits: Sigma Connected provides customer contact services, requiring efficient scheduling and communication among a large team of customer service representatives.

   d. Relevant contact persona: Scott Evans - HR Director.
   Andrew Law - Chief Financial Officer

10. Assuta Medical Centers

a. Industry: Healthcare (Hospitals & Outpatient Services).

b. Employees: ~3,500.

c. Why It Fits: As one of Israel's largest private hospital networks, Assuta operates multiple medical centers and clinics across the country. Coordinating shifts for nurses, technicians, and support staff—many of whom are deskless—requires efficient scheduling, task management, and communication tools to ensure high-quality patient care and operational continuity.

d. Relevant contact persona: Roni Lars - Head of Human Resources Department.
Liat Bar David - Head of Information Systems and Technology Division.

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3. Personalized Outreach Messages - Afikim

Email Message to Eran - HR Manager:

Subject: Improving Field Employee Engagement & Management at Afikim

Dear Eran,

I'm reaching out to you as an HR Manager at "Afikim". Having seen your background in HR and Operations at "Partner", I was truly impressed. It's clear you have a deep understanding of workforce challenges, especially those pertaining to mobile and frontline employees. As a company with thousands of drivers and field staff, I assume "Afikim" faces significant challenges in managing its workforce and streamlining processes.

In the public transportation industry, we understand that difficulties with real-time communication with drivers, complex onboarding processes, and employee retention are significant challenges that impact daily operations and employee satisfaction.

As someone who has championed Wellbeing strategies and various training programs, and who is interested in Employee Relations and Operations Management, I believe you are looking for solutions that can bridge these challenges.

I'd like to introduce you to **Connecteam** - an all-in-one platform specifically designed for the mobile workforce. It enables companies like "Afikim" to significantly improve internal communication, streamline onboarding and training processes, and efficiently manage shifts and attendance - all through a user-friendly, intuitive, and simple mobile app.

I'd be happy to speak with you briefly (15-20 minutes) to better understand the specific challenges at "Afikim" and to explore how Connecteam could potentially contribute to your operational efficiency and employee well-being.

Would you be available for a short call early next week?

Sincerely,

Tal Alper ǀ Sales Consultant ǀ Connecteam

LinkedIn Message to Eran - HR Manager:

Hi Eran,

I came across your impressive profile as VP of HR at "Afikim" and I was particularly impressed by your extensive experience at "Partner" and your ability to drive significant changes in HR and operations. As someone who has championed Wellbeing strategies and various training programs, I assume you are very familiar with the challenges of retaining and managing drivers in the transportation industry.

At Connecteam, we specialize in all-in-one solutions for companies with mobile field employees (like drivers). Our goal is to improve real-time communication, streamline training and onboarding processes, and simplify shift and attendance management. Our app helps boost employee engagement and improve operational efficiency - topics that I believe are highly relevant to your role.

I'd be happy to chat briefly (15-20 minutes) to understand Afikim's needs better and to see how Connecteam could potentially assist you.

Sincerely, Tal Alper.

Email Message to Shay - CFO :

Subject: Opportunities for Cost Savings & Financial Accuracy with Afikim's Mobile Workforce

Dear Shay,

I'm reaching out to you as the CFO of "Afikim". Having seen your impressive background within the company, and especially your extensive experience in financial management at "Egged" and your expertise in budgeting and ERP, I understand you possess deep knowledge in these areas. I'm convinced that in your role, you consistently seek opportunities to generate economic value and address the financial challenges inherent in managing thousands of drivers and other field employees.

In the transportation industry, mobile workforce costs represent a significant portion of expenses, and difficulties in managing and controlling employees mean that field reports can directly impact the bottom line. As someone deeply involved in areas like Income Tax and Auditing, I assume you are looking for solutions that ensure not only operational efficiency but also financial transparency and regulatory compliance.

We are observing a growing trend among leading organizations and companies to adopt technological solutions that improve and streamline these challenges. This is where **Connecteam** comes in - our platform is an all-in-one solution designed precisely for companies with a mobile workforce like "Afikim". We enable companies to dramatically improve attendance report accuracy, optimize processes and tasks, and provide real-time data - all of which can lead to cost savings and better financial understanding.

I'd be happy to speak with you briefly (15-20 minutes) to better understand the specific financial challenges at "Afikim" related to your mobile workforce, and to explore how Connecteam can help you achieve your financial goals.

Would you be available for a short call early next week?

Sincerely,

 Tal Alper I Sales Consultant I Connecteam

LinkedIn Message to Shay - CFO:

Hi Shay,

I came across your impressive profile as CFO at "Afikim" and particularly noted your extensive experience in financial management at transportation companies like "Egged". You will bring deep expertise in areas such as budgeting, ERP, and cost management. I imagine you are always looking for ways to optimize operational costs and improve the bottom line in an operational company of this scale. This is especially true given that the public transportation industry faces significant financial challenges, with workforce costs, scheduling errors, and attendance issues dramatically impacting the budget.

At Connecteam, we specialize in all-in-one solutions for companies with mobile field employees (like drivers). Our aim is to improve the accuracy of attendance reporting, streamline scheduling processes, and provide access to real-time operational data from the field, all through a simple, accessible mobile application.

I'd be happy to chat briefly (15-20 minutes) to better understand Afikim's financial needs and to see how Connecteam can assist you.

Sincerely, Tal Alper.

Personalized Outreach Messages - Isrotel:

Email to Sharon Helfenboum - Organizational Development and Instruction Manager:

Subject: What if every new hire at Dan felt trained by Day 3?

Hi Sharon,

I'll keep this brief - you've built a career helping hotel teams grow stronger from the inside out. But even with the best L&D strategy, maintaining consistency across roles, properties, and deskless teams is a real challenge.

That's where Connecteam comes in.

We help hotel groups ensure that everyone, from the concierge to the kitchen to the night shift, receives the same clarity, coaching, and confidence from day one. No paper. No chasing. No clunky tools.

If that sounds like the culture you're building at Dan Hotels, I'd love to share how we're doing it with others in hospitality - and how it could work for you too.

Would you be open to a 15-minute chat next week?

Warmly,
Yarden Maman
Sales Consultant | Connecteam

LinkedIn message to Sharon Helfenboum -

Hi Sharon,
I've been following the great work you're doing, building strong teams at Dan Hotels. I'm curious - how are you currently approaching onboarding for roles that aren't tied to a desk?

At Connecteam, we're helping hotel groups deliver consistent, high-impact training from day one - without paperwork or chasing.
Would love to connect and share what we're seeing across the hospitality space.

Yarden

Email message to Golan Cohen - VP Human Resources:

Subject: Scaling culture and consistency across every property

Hi Golan,
 I'll keep it short - leading HR at a group as large and dynamic as Isrotel means constantly balancing people strategy with operational execution. Even with great systems, ensuring every employee - in every location - gets a consistent and impactful start is no small feat.

That's where Connecteam comes in.
 We help hotel groups streamline onboarding, training, and internal comms for every role - from back office to front line - with one centralized, mobile-first platform. It gives HR full visibility, local teams full autonomy, and new hires a clear runway to succeed from day one.

If you're focused on scaling culture and experience without adding overhead, I'd love to share how others in hospitality are doing it and what it could look like for Isrotel.

Would 15 minutes next week work to connect?

Warm regards,
 Yarden Maman
 Sales Consultant | Connecteam

LinkedIn message to Golan Cohen - VP Human Resources:

Hi Golan,
 Leading HR across a group like Isrotel comes with a unique challenge - delivering a consistent employee experience across properties and roles.

At Connecteam, we help hotel groups streamline onboarding, training, and comms - all in one mobile platform.
 Would love to connect and share how others are doing it at scale.

Yarden

Call Cold Script Template:

General Cold Call Script

Goal: Schedule a short discovery meeting (15-20 min) that fits the persona's / company's needs.

Opening and time confirmation

Me: Hi [persona's name], this is [my name] from 'Connecteam'.
 Did I catch you at a good time for a quick chat?

Possible responses:

- ○ **YES / What is this about?**
  Me: Great, thank you!
- ○ **NO**
  Me: No problem at all. Is there a better time I can call back, maybe tomorrow morning or later in the afternoon?
- ○ **Not interested**
  Me: I totally understand. Thanks for your time, have a great day.

Short introduction and personalization

Me: I'm reaching out because we work with companies that have frontline, deskless, or field teams, like drivers, branch workers, or field technicians, and we help them manage operations and communication more easily through a single mobile app.

It includes things like scheduling, time tracking, internal communication, task management, and training - all from one place.

Discovery question

Me: Just out of curiosity - how do you currently manage communication and day-to-day operations with your frontline teams?

Possible responses:

- ○ **If the persona shares a problem**
  Me: I hear that a lot. That's exactly where Connecteam helps similar companies improve and save time and money.
- ○ **If the persona asks why I'm asking**
  Me: I'm just trying to understand if our solution can be helpful for you. Many companies we speak with face similar issues, and we've been able to help them solve it quickly.

Scheduling follow‑up

Me: I know this is an unexpected call, but it really sounds like this could be a good fit.
 Would you be open to a short 15‑20 minute call, where I can tell you more about our company and show you how similar companies are handling these challenges with our solution?

Possible responses:

- ○ **Yes**
   Me: Great! Would [day] at [time] work for you?
- ○ **Ask for an email instead**
   Me: Sure, happy to send info. Just so I can send you the most relevant material, what would you say is your biggest challenge right now?
   Also, would it be okay to follow up next week with a short call to go over it?
- ○ **Not interested**
   Me: Totally understand. Thank you again for your time.

Confirm the meeting and wrap up

Me: Perfect, so we'll speak on [day] at [time].
 I'll send over a calendar invite with all the details.
 Thanks again! Looking forward to our chat!

4. Call Cold Simulation:

Afikim, Eran ‑ HR Manager: link

5. Sales Pitch Presentation:

link

6. Discovery Questions:

1. <u>Discovery Goals -</u>
   a. **Current Tools & Processes:**
      ● What tools is Afikim currently using to manage HR operations, especially for non-desk teams (scheduling, time tracking, communication, onboarding, training)?
      ● How effective are those tools?
      ● What frustrations or gaps exist today?
   b. **Workforce Structure & Pain Points:**
      ● How many employees are non-desk vs. office-based?
      ● Are there challenges around communication, compliance, accountability, or manual tasks?
   c. **Internal Workflow & Stakeholders:**
      ● Who's involved in decision-making for HR tools?
      ● What does the HR workflow look like on a daily and weekly basis?
   d. **Goals & Priorities:**
      ● What is Eran looking to improve or simplify in HR operations?
      ● Are there any KPIs or strategic initiatives tied to workforce efficiency or employee engagement?

2. <u>Key Message & Feature Focus -</u>
   "Connecteam is the **#1 all-in-one app** built for HR teams managing **non-desk employees**. We help companies like Afikim reduce paperwork, improve compliance, and **digitize HR processes** - from communication to training - in one simple mobile solution".

   a. **Save hours of admin work per week** by automating repetitive tasks:
      ● Use <u>Time Clock & Scheduler</u> to build shifts quickly, prevent time theft (with GPS/geofencing), and export payroll data easily.
   b. **Improve workforce accountability** through:
      ● <u>Read receipts, GPS logs, time tracking,</u> and digital signatures - all accessible in real time from one dashboard.
   c. **Boost employee experience** with intuitive mobile tools:
      ● <u>Communication Hub</u> to reach employees without email or WhatsApp.
      ● <u>Training & Forms</u> to assign onboarding flows, collect feedback, or submit requests easily.

d. **Everything in one place** – no more juggling Excel, paper form,s or multiple apps:
- Knowledge Base / Docs to give staff instant access to safety protocols, HR policies, and training guides.

3. Steps We Would Ideally Like to Put in Place -

- Offer a free Connecteam trial and a few team leads with a focused use case.
- Schedule a second meeting with additional stakeholders.
- Set a clear follow-up date to align before any internal planning or budget review.

7. First meeting simulation

link