

# Concept.

## Business Case Study.



### About Hodge

Hodge is a family-owned and operated material handling and logistics company headquartered in Dubuque, IA. The company provides services including material handling equipment sales and service, third-party logistics & warehousing, and real estate development. With 60+ years of experience, Hodge employs over 800 employees across 5 states - Iowa, Illinois, Wisconsin, North Carolina, and Georgia.

### Project Details

Ongoing Support  
Monthly Retainer  
5.5 years

### Partnership Highlights

- 1 **90% Repeat Business**
- 2 **100% Certified Resources**
- 3 **97% Projects Within Budget**
- 4 **12+ Certifications**
- 5 **260+ Completed Projects**

## Challenges

Hodge struggled with communicating effectively and timely across various departments and locations for several key business areas - new/used inventory, rental inventory, credit applications, and demo requests.

Concept partnered with Hodge to create processes that would enhance their technology and communications.

1

### Managing Inventory

Hodge experienced difficulty with managing new and used equipment purchases, rental requests, and overall equipment needs for clients. Tracking and communicating across many departments lead to challenges with visibility and ordering.

2

### No Visibility to Market Intelligence & Territory

While conducting business operations, Hodge lacked visibility into key marketing intelligence and the ability to allow multiple sales reps account access.

3

### Outdated Process for Credit Apps & Demo Requests

Hodge's process for customer demo requests and credit applications were being done on paper and certain departments within the organization lacked visibility into the process.

## Solutions & Results

### Improve Communication & Inventory Visibility

Improve:

- ✓ Back-and-forth communication
- ✓ Search for available equipment in the dealer's current inventory
- ✓ Search for equipment outside of the dealer's inventory

Concept developed a used equipment tool that brings all moving parts of the used equipment process into a centralized spot in Salesforce. Customers are presented with suitable new, used, or rental equipment options by Hodge faster than the competition.

### Implement Material Handling Accelerator & Territory Management




Concept implemented material handling accelerator and territory management solutions into Hodge's CRM. These solutions help capture relevant data points that will help build a strong pipeline and ensure access for visibility managing parts or service sales.

### Create Streamlined Process & Technology for Credit Apps & Demo Requests

Working with management and division leaders, Concept and Hodge developed a process that streamlined demo requests and credit applications. The credit application was built within HubSpot and contacts can then be imported in Salesforce. Demo requests were automated, and the appropriate branch managers could handle approvals. To simplify the management of the process for the service coordinator, Concept created reporting to show the delivery and pick-up schedule of all demo equipment.

# Concept.

202 Montrose West Ave.  
Suite 100  
Copley, Ohio 44321

 (330) 336-2571  
 [info@conceptltd.com](mailto:info@conceptltd.com)  
 [www.conceptltd.com](http://www.conceptltd.com)