

HODGE

CASE STUDY

Hodge faced some challenges when it came to technology integration and how to streamline many outdated processes.

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

Initial D&I Project
4 Months
(9/17 - 12/17)

Location
Medina, OH

Ongoing Support
Monthly Retainer
(12/17 - Present)

PARTNERSHIP HIGHLIGHTS

90% REPEAT BUSINESS

100% CERTIFIED RESOURCES

97% PROJECTS WITHIN BUDGET

CERTIFICATIONS 12+

COMPLETED PROJECTS 260+

Established in 2002, Concept is an outsourced full-service B2B sales development & marketing agency that assists our clients through the design, implementation, and execution of their B2B sales development and marketing strategies.

CHALLENGES & SOLUTIONS

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.

01

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.

IMPROVE COMMUNICATION & INVENTORY VISIBILITY



Improve:

1. the back-and forth communication,
2. the search for available equipment in the dealer's current inventory, and
3. the 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.

02

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.

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.

03

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.

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.