

Concept.

Business

Case Study.



MH Equipment
People, Passion, Purpose...

About MH Equipment

MH Equipment is one of the largest and fastest growing material handling service providers in the U.S. Since 1994, MH Equipment has evolved from a small company of 50 employees into an organization composed of over 900+ employees, 33 full-service locations, and 29 servicing locations throughout Illinois, Indiana, Iowa, Kentucky, Missouri, Nebraska, South Dakota, Ohio, Pennsylvania, and West Virginia.

Project Details

Sales Development & CRM
8 years

Partnership Highlights

- ✓ **\$62.5M+ in pipeline contribution**
- ✓ **7,900+ qualified leads generated**
- ✓ **7,000 cleansed & profiled accounts**
- ✓ **625+ prospect satisfaction surveys completed**
- ✓ **3,000 customer satisfaction surveys completed**

Challenges & Solutions

Throughout the partnership, MH Equipment leveraged Concept in a variety of ways including: outbound sales development, data cleansing & profiling, prospect and customer satisfaction surveys, and Salesforce consulting, support & training.

1

Outbound Sales Development Support Needed

Concept partnered with MH Equipment to provide Sales Development support across multiple divisions.



Utilize Outbound Sales Development Support

Concept partnered with MH Equipment to provide Sales Development support across multiple divisions:

- Material Handling
 - Identify needs for: new lift trucks, aerial equipment parts & service, short- and long-term rentals, allied products, and training
- Industrial Cleaning Equipment
 - Identify needs for: industrial cleaning equipment, parts, service opportunities, or cleaning equipment rentals
- MH Engineered Solutions
 - Identify engineered solutions opportunities including: material handling systems engineering, facility layout and design, warehouse management software, and order fulfillment technology and automation
- JCB Construction Equipment
 - Identify needs for: new or used JCB equipment, parts and service, and short- and long-term rentals

Concept developed an outreach strategy leveraging outbound phone calls and email to identify the following essential qualifiers within key accounts with the ultimate goals to provide qualified sales-ready leads to MH Equipment's sales team.

Essential Qualifiers (EQs)

Who is the decision maker?	Where is their need? (facility, location)
What is their need?	How are they managing their needs currently?
When is their need?	Why are they interest in working with or meeting with MH Equipment?

Challenges & Solutions

2

Non-Existent Data Cleansing & Profiling

✓ Data Cleansing & Profiling Support

MH Equipment has a large territory and a database of over 100,000 accounts. MH Equipment partnered with Concept to cleanse data and provide profiling support. Concept's team executed a combination of internet research and out-bound phone calls to help identify key intel within accounts including:

- Decision Maker
 - Contact information, decision-making authority, familiarity with MH Equipment
- Account
 - Facility information
- Competitive
 - Service provider and service agreement details
- Fleet
 - Acquisition mode, fleet size, brands, class of trucks, weight capacities, fuel and battery types, net purchase time frames, etc.

3

Improvement Needed with Use of CRM

✓ Salesforce Consulting, Support & Training

MH Equipment leverages Salesforce as their CRM. Over the course of the partnership, MH Equipment worked with Concept's CRM division on various Salesforce.com projects, including:

- Training & manual creation
- Administration
- Automated lead update process
- Sales commission calculator

Challenges & Solutions

4

Satisfaction Surveys

✓ Prospect Satisfaction Surveys

Concept partnered with MH Equipment to improve their process of lead follow-up, ensuring all MH Equipment leads were followed up with and managed effectively. MH Equipment recognized the importance of a top-tier customer experience throughout the customer life cycle. They put a focus on gaining insight to pre-sale activity & lead progression. Concept provided outbound phone and email support to gauge prospective client's feedback on MH Equipment's response to their needs. Concept provided MH Equipment's sales/marketing team with a compilation of feedback, including:

- Unqualified web lead or purchased from competition
- Made purchase from MH Equipment
- Met with rep/no need
- Met with rep/still has a need
- No rep follow-up/still has a need
- No rep follow-up/no need
- CRM opportunity close/new CRM opp created

This insight helped MH Equipment to identify holes in their existing lead management process. The actionable reporting developed inside of this initiative allowed MH Equipment the ability to streamline lead progression and process/CRM adoption.

✓ Customer Satisfaction Surveys

MH Equipment is committed to the customer experience and puts a focus on gauging satisfaction levels across their client base. Concept partnered with MH to provide personalized phone outreach to ensure customer needs were met across all areas of the business including:

- Equipment purchases
- Performed service
- Parts purchases
- Rentals
- Training

Concept captured customer ratings through the utilization of net promoter score (NPS). Concept's team asked satisfied MH clients to provide a testimonial of their experience to be used by MH Equipment for future marketing efforts. Those clients dissatisfied with their experience were routed to and escalated within the MH team for prompt attention.

Concept.

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