



CASE STUDY

Elevation Marketing delivers mobile sales enablement app, bridging the gap between marketing and sales

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elevationmarketing

As Haas Automation increased in size, building a scalable sales team became a high priority



BACKGROUND

Winning CNC market leadership

U.S. machine tool maker Haas Automation, Inc. is the largest unit-volume builder of CNC machine tools. Haas Automation was founded by Gene Haas in 1983 for the purpose of delivering the most accurate, repeatable and durable Computer Numeric Controlled (CNC) tool line in the western world.

The Oxnard, California-based company offers a complete line of CNC vertical and horizontal machining centers as well as CNC lathes and rotary products, including programmable rotary tables, indexers and machine tool accessories.

All products are manufactured at the company's 1-million-square-foot facility, but the company relies on a network of sales reps and distributors to sell its CNC precision machine tools and specialized accessory tooling.



CHALLENGE

Sales and marketing alignment for geographically dispersed teams

The Haas Automation marketing team was seeking to replace a current mobile application with a more comprehensive sales enablement tool for the dynamic presentation of product, language and pricing from enterprise data.

The company wanted to provide field reps an easy, intuitive way to update content and retrieve relevant marketing collateral wherever they need it, when they need it and in their customers' preferred language.



The app needed to tackle three areas of focus:

Multilingual and Multicurrency Management

Haas Automation had a platform that displayed a subset of product data in only two languages, but needed an app with multilingual and multi-currency capabilities to better serve its +1,500 sales reps and a dealer base of more than 170 private distributors worldwide.

Real-Time Updates

Machine specs were hard coded into the existing app and proved difficult to maintain as developed. Product information did not accurately reflect dynamic enterprise data cached from three different databases (SAP, SPECS and a SQL database), housing product text and images.

Mobile Web Accessibility

The sales team had limited access to updated pricing, current sell sheets and product availability from the trade show floor — the primary marketing medium of sales reps. The cost and reliability of trade show Wi-Fi posed a challenge. Haas Automation needed a mobile sales app that field reps could use without requiring Wi-Fi for download.

Additionally, attendees could review product information on the show floor, but did not have access to the company's entire product line when accessing from a mobile device. The system lacked the capability to specifically assign separate and secure access for guests to view product inventory and specifications. Unsatisfied with the time required to update content and the absence of reliable access to product info, Haas Automation turned to Elevation Marketing to help inform and improve the company's sales enablement strategies.

STRATEGY

A multilingual sales enablement application

The solution was a multilingual sales enablement application. It communicated product line specifications, features, pricing, options, images and descriptions for use in global sales efforts, including trade show demonstrations and Haas Factory Outline product showrooms.

How it works: The mobile app automates the company's production of customer-precise value by allowing field reps to search product specifications per the buyer's requirements, retrieve up-to-date product inventory and pricing and access ample content to help deals progress through the sales cycle.

The app uses clean fonts, sleek UI elements and a minimal interface inspired by the flat color stylings of Apple.



Main features of the mobile application include:

User Authentication

Ability to manage who has the rights to access application upon installation

User Management

Content defined by user roles/rights definitions

Product Portfolio

Supports 88 current products (25 core) at launch, expected to grow

Language Translations

Complete product offering represented in 11 different languages specific to the user's location

Multiple Currencies and Price Lists

Products available in multiple-currency pricing and regional pricing structures, allowing field reps to tailor presentation materials for smarter selling

Operating System

iOS and Android at launch

Supported Devices

Optimized for tablet and mobile phone access

Data Synchronization

Minimal scheduled monthly updates from enterprise feeds, ad-hoc push

Ability to Work Offline

Displays accurate, current enterprise data from both connected and stand alone access points; users can download the large app without being on Wi-Fi

Site Management

Content management system with an easy-to-use dashboard for monitoring and pushing website content and UI changes in real time

Content Formats Supported

Text, images and video

Content Administration

Ability to delete, edit and upload new product information via database feed and/or application admin

Content Updates

Automated updates in app when connected to Wi-Fi

Responsive Design

Administrators can lock on particular products at trade shows and events, allowing a smartphone or tablet to act as a selling tool at product kiosks





The project began with the discovery, definition and review of business requirements. Preliminary market research was completed and user requirements defined.

Next, a content audit was performed, followed by a remapping of marketing materials based on the defined curriculum and sales process.

The information collected early in the process was used to create use cases and functional specifications to guide the project.

Examples of use cases developed:		
PRECONDITION	USE CASE	HIGH-LEVEL MAIN SCENARIO FLOW
Non-Authenticated Visitor	I am a mobile visitor and I want to find and download the application (but I am not a Haas employee), so I can access competitive product information	1. Download application 2. Attempt to log-in with non-Haas domain email address 3. Get security message
Non-Authenticated Visitor	I am a Haas Employee and I want to download the application, so I can see what my colleagues in the Accounting Department have been talking about	1. Download application 2. Attempt to log-in with Haas domain email address 3. Not recognized as an authenticated user of app 4. Get security message
Authenticated user, logged in with read privileges only	I am an Educated CNC buyer and I want to change application content to match my native language, so I clearly understand the product description and pricing specific to my user location	1. View application from tablet in booth at a trade show 2. View single product information 3. Change language from default English to German and view refreshed product information
Authenticated user, logged in with read privileges only	I am an Educated CNC buyer and I want to review machine specifications, so I can assess if the machine will fit my shop floor	1. View application from tablet in booth at trade show 2. View single product information 3. Navigate to view specifications for that product in detail
Authenticated user, logged in with read privileges only	I am an Educated CNC buyer and I want to look at the options available for my current machine, so I can evaluate a purchase	1. View application from tablet in booth at trade show 2. View single product information 3. Expand information to display comprehensive equipment options 4. Toggling descriptions of features on-demand
Authenticated user, without application download - therefore not logged in	I am an HFO Salesperson who wants to download the application, so I can use it on my sales call	1. Click URL, link in HFO Portal while signed in 2. Redirected to landing page with application download directions 3. Downloads application upon user authentication 4. Confirms default or HFO selected settings for language, currency and product display 5. Views product-specific reference information



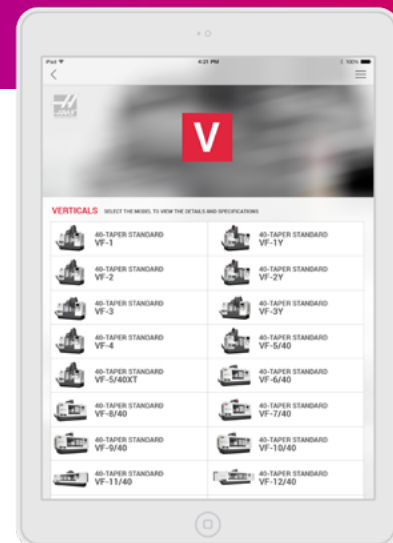
User Persona – Prospective Buyer

- Educated Buyer Brian**
 - BACKGROUND:**
 - Machine shop owner
 - Technical education degree
 - Former industrial user but staff to operate equipment
 - Prospective buyer
 - DEMOGRAPHICS:**
 - Male
 - 48 to 55 years old
 - College
 - Education
 - Spent years at trade shows or HFO sites
 - HOBS:**
 - Need to know how each piece of equipment can positively impact my shop's production
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 - Need to know how each piece of equipment can positively impact my shop's production

Following rigorous digital asset development procedures, Elevation Marketing created the app's comprehensive functional and technical specifications, wireframes and creative design.

Elevation collaborated with the Haas IT department to determine the best way to funnel data into the app server, loading/parsing/transforming product data from Haas' three enterprise databases. The sales enablement app also folded in a 'value proposition' booklet that was created for sales reps, and included:

- CRM integration
- A dynamic pricing/quote builder (similar to website functionality)
- Product lead time information
- A payback calculator
- Financing information
- Standard product pricing with available option pricing



App Concepts

BUSINESS WINS

Sales enablement mobile app speeds sales process worldwide for Haas Automation

In addition to enhancing the product offering from both visual and technology standpoints, the Haas mobile app is gaining widespread traction as an effective sales tool by virtue of its responsiveness to reps' needs.

Customers expect field reps to quickly deliver relevant product information and pricing in live selling situations, and companies that can't deliver on those prospect expectations often risk losing the sale.

With the launch of the application, Haas sales and marketing teams can now perform as one cohesive unit to facilitate the buying process. Teams are more responsive and agile. Hundreds of sales reps and private distributors now have up-to-date marketing materials in-hand that can be accessed instantly in the appropriate language

and with the correct local pricing. They can quote faster, provide ROI payback information on the spot and discuss financing options. Sales reps can also check on product lead times and access information from CRM through the app. Leveraging this new sales enablement technology, sellers are now able to transact business seamlessly, sell in a buyer-responsive manner and close deals faster.

With a turnkey, self-service solution from Elevation Marketing, Haas improved sales productivity by dramatically reducing the amount of time devoted to administrative tasks for product changes. As a result, Haas enjoyed the ease and flexibility of submitting, updating and accessing documents and information without spending additional money or waiting for an outside firm.

Elevation Marketing delivered a sales enablement tool that exceeded our expectations

Providing our largely mobile workforce with accurate information and specs for our 88 products and their various configurations, in the appropriate language, is imperative for us



ABOUT ELEVATION

Full-Funnel Marketing Solutions for Today's B2B Buyers.

Elevation Marketing creates meaningful customer engagements and sustainable results through data-driven, digital-first solutions that inspire change, motivate action and deliver predictable outcomes. Whether it's brand, demand, ABM, channel or sales enablement, we are experts in connecting brands to people and performance through end-to-end B2B marketing programs. By looking at your brand through the lens of your business, we help you break through the

obstacles that stand between you and greater sales, increased market share and increased revenue for maximum return on your investment.

**Ready to discuss
your project?**

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