

## Building Your Company To Achieve PROFITABLE Growth

Go To Market Strategies  
Presented by Rob Golin



## Detailed Operating Budget

- IF YOU DON'T HAVE A MAP, HOW DO YOU GET THERE?
- Where have you been and where do you want to go?
  - Last Year?
  - This Year?
  - Year 2?
  - Year 3?
  - M&A Strategy (Buy, Sell, Merge)
- Operating Budgets are ALWAYS dynamic
  - Dependent on growth strategy



## Been In Your Shoes and Worn ALL the Hats!



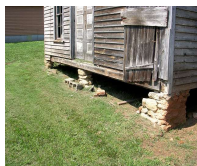
## Work-Flow Charts



- Operational Work Flow
- Current Business
  - Escalation Tree
- New Business Opportunities
  - Due Diligence tied to size of opportunity, startup costs, profit margins
    - Larger the opportunity brings more team members into play



## Start With A Solid Foundation



### Current Organizational Chart

- Detailed Job Description for each seat



## Diversification by Vertical

- As a result of market changes
  - Overnight Shippers (FEDEX, DHL, UPS)
  - Uber
  - Shipt
  - Amazon
- New revenue streams



### Diversification by Service Type

- On demand
- Scheduled
- Routed
- Distribution
- Cross Dock
- Critical parts storage and JIT delivery
- Warehousing
- Fulfillment



### Implementation of New Business

- Playbook covering ALL DETAILS of startup
- Buy-in from CUSTOMER



### Diversification by Service Type

- Dedicated Fleet
- Facilities Management
- Mailroom Management
- “White Glove” Service
- Final/Last Mile
- NFO



### KPI

- Measure
  - Quantitative
- Monitor
- Adjust
- Measure AGAIN



### Diversification by Service Type- Focus

- Competitive analysis
  - How many competitors?
  - Positioning in the market
  - Where’s the “sizzle”?
    - **Differentiation from the competition**
  - Profitability
  - Budget



### Geographic Expansion

- Acquisition
- 3PL Model: Non-asset based
  - Management
  - Metrics Reporting
- Customer Driven
- P+L for each new market
  - Each new account stands on its own



## Geographic Expansion- Challenge

- Financing the growth
- Staying within yourself
  - Control the growth
- Cost related to service type
  - Distribution
    - Warehouse
    - Racking



## Salespeople



30. (139) (100 minutes: 1.39 f-word/min)



## Geographic Expansion- Challenge

- Methodology for “Bricks and Mortar”
  - When do you open?
    - Break Even?
    - In the red with deadline for additional growth
    - In the black



## Salespeople

- Professional
- Relationships with Prospects & Customers
- Finding them
- Managing them
- Helping them: Provide the toolbox for success
- Compensating them
- 80/20 Rule



## Growth Summary

- Control the growth
- Measure the growth
  - P&L
  - KPI
- Know when to say no
  - Square pegs don't fit in round holes!
- Percentage of business with one customer, service or vertical
  - Whales, Dolphins and Minnows



## Salespeople – The Right Fit

- Enjoy working with internal team and external prospects and customers
- Believe in the Services the Carrier Provides
- Have Passion in your role with Carrier
- HAVE FUN!
- ALL ABOVE IN PLACE and success will follow for the Customer, Carrier and Salesperson!



## Salespeople-Get the Best

- Within the industry
- You want the best, pay for the best
  - Get Creative
- Sales and operational background a plus
  - If they don't have an operational background, provide it to them as to not "oversell"
- Social Media
- Headhunters



## CRM: AS IMPORTANT AS OPERATIONAL SOFTWARE

- CRM
  - BUY-IN FROM SALES GROUP
    - If not used properly, the output of information is flawed, same as operational software
  - CRM is an ASSET, not a LIABILITY
    - Mailmerge
    - Template auto-fill for customized company forms



## Salespeople-Manage Them

- CRM
- Meetings
  - Weekly with a specific time limit
  - Help team focus on company goals
  - Help team with prospect objections and solutions
- Micro vs. Autonomy
  - Each salesperson is different



## CRM: CONTACTCENTRIC DB

- Contacts can also rollup to Company
- Prospects and Customers should be classified by:
  - Service Type
  - Vehicle Type
  - Vertical
  - Size of Opportunity
  - Selling Cycle, including time to close
- THIS WILL HELP YOU MEASURE, MODIFY AND ADJUST TO GET THE "BIGGEST BANG FOR YOUR BUCK" (Opportunity Cost)



## CRM: AS IMPORTANT AS OPERATIONAL SOFTWARE

- CRM
  - Dashboard
  - Opportunities
  - Pipeline
  - Activities
    - Calls
    - Meetings
    - To-do's
    - Series by Opportunity
  - Scalability
  - E-mail integration
- CRM links
  - Accounting
    - QuickBooks
    - Great Plains
    - MAS
    - ETC.
  - Marketing
    - SwiftPage
    - CoolerEmail
    - Constant Contact
    - Mail Chimp
    - Social Media



## CRM: Database

- Prospects and Customers stay with the COMPANY
  - Make sure permission levels within the CRM provide this
- Another tool tied to buying/selling/merging



### Which CRM Do I Choose?

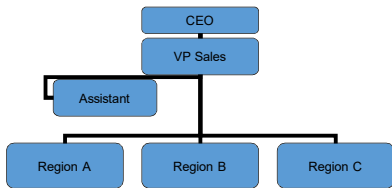
	HubSpot CRM	Microsoft Dynamics CRM	Salesforce	Oracle CRM	NetScout Systems	Insightly	Pipedrive	Zoho CRM	Acquia
Lowest Price	SEE IT	SEE IT	SEE IT	SEE IT	SEE IT	SEE IT	SEE IT	SEE IT	SEE IT
Editor Rating	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★	★★★★★
Dedicated Document Library	✓	✓	—	✓	✓	✓	✓	✓	✓
Role-Based User Access	✓	✓	✓	✓	✓	✓	✓	✓	✓
Multi-Currency Support	—	✓	—	✓	✓	✓	✓	✓	✓
Workflow Automation	✓	✓	✓	✓	✓	✓	✓	✓	✓
Integrates With Email Provider	✓	✓	✓	✓	✓	✓	✓	✓	✓
Custom Leads	—	—	—	—	—	—	—	—	—

### Sales Organization By Expertise

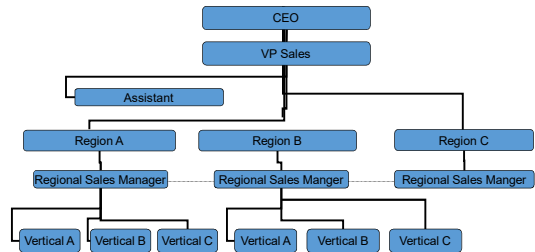
- Know ALL aspects of prospects/customers needs based upon vertical, service type & location
- Consultive selling technique
- Make recommendations for improvements
  - Working with your operation’s team for the fit
- Know when to say NO.....SQUARE PEGS DO NOT FIT IN ROUND HOLES!



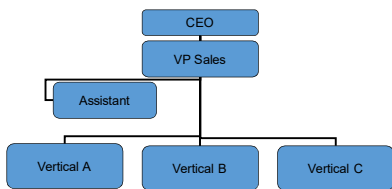
### Sales Organization-Geographic



### Sales Organization-Detailed



### Sales Organization-Expertise



### Account Managers

- Work as a team with Salespeople
- Closely work hand in hand with Customer
- Salespeople reduce the interaction to a degree
  - Customer likes the Salesperson so keep them engaged but provide them the opportunity to target additional prospects
- Account Managers should provide a “cradle to grave” approach with the Customer

## Going to Market

- Work synergistically with Sales Team
  - Target marketing
  - Social Media
  - SIC codes: Lists
  - Trade publications
  - Conferences
  - Track/Measure



## Terminating a Customer

- Profitability Analysis
- Accounts Receivable Issues
- No Partnership
- Value to Customer for Quality Service
  - Understanding "soft costs"
- Do it the RIGHT way....don't burn a bridge



## Summary

- Plan your work and work your plan
  - Plans are dynamic
- Always measure against projections
  - Projections are dynamic
- We all make mistakes
  - Fool me once, shame on you, fool me twice shame on...
- Be the Conductor of the Orchestra
  - Provide the proper tools for your team and let them run with the ball

