



SALESFORCE AE / SE PLAYBOOK

BUILDING PRODUCTS MANUFACTURERS

In this Playbook, you will find:

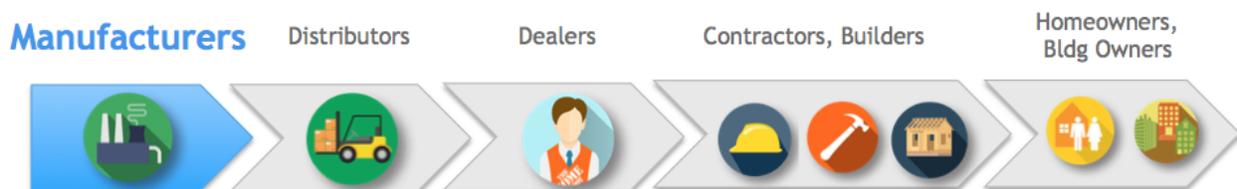
- A Quick Overview: Understanding This Industry
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Questions? Contact:

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A Quick Overview: Understanding This Industry

Building products manufacturers (BPMs) produce the materials/components that go into residential homes, commercial buildings, and industrial/infrastructure applications. Products include everything from structural materials (i.e., concrete) to finishes (i.e., floor coverings) to equipment (i.e., HVAC systems). Hunley Group identifies BPMs as a distinct vertical apart from other manufacturing companies given the uniqueness of the go-to-market process, which is completely unlike any other manufacturing vertical.



The sales process differs for commercial/industrial/infrastructure applications (including everything from hospitals, schools, and multi-family residential to roads and bridges) and single-family residential, so it's important to establish whether the BPM targets one specifically, or both, to know the best use cases for Salesforce.

For commercial/industrial/infrastructure projects, products are normally specified by architects and/or engineers (in the case of infrastructure, engineers instead of architects are the primary specifiers). This highlights a critical element of the sales process for BPMs – the key influencer / decision-maker for a purchase is never the economic buyer, and doesn't write checks to the BPM at all. Without an architect/engineer *specifying* their products, the contractors constructing the building will not be able to use the BPMs merchandise for the project.

Regardless of market focus, given the highly-fragmented nature of the end buyers, products are typically sold through two- or three-step distribution (passing through distributors, dealers and finally subcontractors before a general contractor or homeowner pays for them).

For single-family residential applications, products are not typically specified by an architect or engineer, but may be influenced by the homeowner or home builder. However, in most cases, it's the installation subcontractor who really makes the product choice – the homeowner decides they want a synthetic deck, and the contractor picks their preferred brand. Or someone asks their neighbor who replaced their air conditioner, and “Acme Heating & Cooling” gets the call and “we install Trane”. Distribution for these applications can follow a similar multi-step approach or go directly to the subcontractor. Therefore, for residential, *building and maintaining a high-quality channel* is the key important sales activity, not actually transacting product sales. In both cases it may be important to maintain good relations with the channel including distributors, dealers, subcontractors and even general contractors.

Building products fall on a spectrum of being largely commodity (where the sale is driven by price and the subcontractor's comfort with the product) to highly engineered or configured, where the sale is largely architect- or engineer-driven.

Key Personas to Engage

- VP of Sales
 - Normally the best place to start, and the most powerful entity in the CRM selection process. The VP of Sales is often an industry veteran either from the residential side or the commercial side, or in some cases has experience in both.
 - They want visibility and management oversight of the key sales processes that will result in moving product – channel engagement and success with specifications. Considering the “decoupled” nature of BPM sales (orders aren’t placed to reps directly), they’re often very interested in gaining real-time sales/shipment visibility.
 - It is likely they be concerned about adoption; there are a lot of “old school” sales reps in this industry who would rather use their little black book than have big brother watching. *Make it look easy to use!*
- VP of Marketing
 - Typically a corporate marketer, either a veteran or an industry outsider. Tasked with brand, demand gen, and product. Wants engagement tools and would like to know what happens to the leads they send to sales. May be driving to deliver digital transformation. Marketing automation will have a strong use case with them for all elements of the channel.
- CIO, VP/Director of IT
 - Often just director-level and may or may not be involved in CRM. May be old school, and worry about security of “the cloud”. Will want to know “how much burden on me?”
- VP of Customer Service/Operations
 - Handles complaints, technical service and maybe logistics. Needs trackable closure of cases and primarily concerned with productivity. May be the central point (or one potential avenue) for order taking. Manage product liability and warranty claims through responsiveness, closure. Would like to keep the channel informed.

Account Targeting

Unfortunately SIC and NAICS codes will miss many building products companies – many do not tie to construction and may not be categorized correctly. For example, a firm manufacturing foam insulation might be categorized as a “chemical manufacturer”, but will certainly not have sales processes akin to typical chemical firms.

Suggested options for targeting BPM firms:

- SIC codes
 - 503x, 5075 (distributors, but includes some manufacturers)
 - 243x, 323x, 324x, 325x, 327x, 328x, 344x
- You may want to try LinkedIn Sales Navigator, which has a category for “building materials” – it does work well if you have access to it, but you have to cross-correlate

- The Hunley Group is happy to supply its lists that include DUNS #'s – just let us know

Make a Strong Pitch: Messaging, with ROI Examples

- “Drive commercial specification growth with Salesforce.com”
 - Track education events (i.e., lunch and learns) and resulting project specifications – as well as inclusions in firm master specs. Track how your spec base is growing over time. Also, track inclusions in master specs (the gift that keeps on giving for future projects)
- “Use Salesforce.com to track your specs from beginning through the sale”
 - Get visibility into what’s happening to your specs – how many are you actually winning? Close the loop by using Salesforce to get project sale information from your channel.
- “Use Salesforce.com to automate substitution requests”
 - Salesforce.com can be automated to help with the generation of substitution requests. Go after more of your competitors’ specs and track how many you win. Save your reps time AND generate more substitution requests with automation.
- “Build and track your contractor channel with Salesforce.com”
 - How often are you touching your channel? Who should you be spending more time with? Use Salesforce to track engagement with your channel and even sales through your channel
- “See how Salesforce.com works for a multi-step distribution building products channel”
 - How successful are you at engaging with the different parts of your channel? Use Salesforce to find out, and to identify areas where your reps need to be spending more time!

Discovery Questions to Ask

1. Do you serve residential, commercial or both?
2. What’s your go-to-market approach?
 - a. Do you use distributors and/or dealers?
 - b. Do you rely on man reps?
 - c. What role do contractors play for you, and how much do you directly engage them?
 - d. Who is your direct customer (distributor, dealer, contractor)?
3. What’s the makeup of your sales team?
4. Tell me how you market your products
 - a. Do you attempt to engage homeowners (the consumer)?
 - b. Do you spend time educating architects and/or engineers?
5. What are your keys to growth? Tell me about your business objectives for the year ahead
6. Residential-focused questions:
 - a. Describe how product reaches your end customer.

- b. Tell me how you interact with homeowners
 - i. Marketing & engagement programs?
 - ii. How do you leverage social media?
- c. Do you send residential leads to your dealers / contractors?
 - i. Is there a “contractor locator” on their website? Try it out ...
- d. Tell me how you work with Home Builders and / or residential subcontractors
 - i. Loyalty programs, marketing coop \$\$\$’s

7. Commercially-focused questions:

- a. How much do you rely on specifications to drive demand for your products?
 - i. Tell me how you engage architects / engineers?
 - ii. What do your continuing ed programs look like?
 - iii. How do you market to specifiers?
 - iv. Who on the team “owns” working with A/E’s?
- b. How do you use the Dodge or ConstructConnect databases?
- c. What role do General Contractors play for you?
- d. What role do commercial subcontractors play?

8. Customer service questions:

- a. Tell me how your CS organization is structured
- b. How do you capture / manage product complaints?
 - i. What impact do product issues have on your bottom line? On your brand?
 - ii. How do you track trends & drive continuous improvement there?
 - iii. What are the response rates, closure times
- c. How are technical questions fielded?
 - i. Burden? How many do you get & from whom?
 - ii. Describe your FAQ / self-serve answer database

Positioning Clouds Correctly for This Industry

Sales Cloud 	Inbox 	Pardot 	Maps 
<p>Unsurprisingly, Sales Cloud needs will be present on essentially every client.</p>	<p>Outlook is essentially ubiquitous & tracking emails is key. Inbox is a frequent upsell.</p> <p>Look for: Sales reps tend to be highly mobile, so the Inbox app can be compelling.</p>	<p>Pardot sells pretty easily here; most clients want to automate engagement with their channel and partners.</p> <p>Look for: A marketing department with at least some digital marketing strength and/or email marketing programs already in place.</p>	<p>Maps has a compelling use case for field sales to map customers whilst in the field. Territory assignment has a very strong play here, as essentially all will have geographic territories and highly-fragmented customer sets.</p> <p>Look for: Sales reps who spend a lot of field time; geographically-aligned territories.</p>
Manf’g Cloud 	Service Cloud 	Experience Cloud 	Tableau CRM 

<p>Building products firms are almost always run-rate businesses; they do sometimes perform account-level forecasting and have rebate programs. It is very rare for them to use sales agreements.</p> <p>Look for: Pain in managing rebates, account-level forecasting.</p>	<p>Most firms in this industry will have customer service reps, but the case management functionality available in Sales Cloud usually meets their needs.</p> <p>Look for: True call center CS operations, IVR systems, desire for phone system integration, omni-channel needs.</p>	<p>BPMs often want to provide self-service engagement of their channel, particularly downstream (dealers, contractors).</p> <p>Look for: The desire to engage channel in a mobile app; mobile publisher is a potent differentiator.</p>	<p>Analysis of trends in sales data, particularly to the product category level, drives demand for in-system BI.</p> <p>Look for: Mid- to high-volume sales data with multiple product lines. Desire to maximize share of wallet, conduct white space analyses.</p>
<p>Engage </p>	<p>B2B Commerce </p>	<p>Marketing Cloud </p>	<p>CPQ </p>
<p>In our opinion, Engage is a very undersold, under-utilized tool in this industry.</p> <p>Look for: Sales reps with need to do small-scale e-blasts to their book of business, opportunities for singleton rinse-and-repeat emails that sales can initiate.</p>	<p>Increasingly, we see more forward-looking clients seeking digital transformation through online sales channels.</p> <p>Look For: A more-sophisticated larger firm seeking to find competitive advantage; will be looking to sell direct, have needs for self-service by channel in purchasing.</p>	<p>Most firms email marketing needs are met through Pardot, but larger firms may need more horsepower.</p> <p>Look for: Larger, more sophisticated marketing departments with high volume email or social mgmt needs. Often the need for direct engagement of consumers is the key.</p>	<p>CPQ is infrequent in this industry, as sales are rarely direct and most products are quoted as simple line items.</p> <p>Look for: Direct quoting with bundled or configured products, sometimes complex price list management.</p>
<p>Field Service </p>	<p>Mulesoft </p>	<p>Tableau </p>	<p>myTrailhead </p>
<p>Field Service applications will be rare; essentially all building materials mfrs rely on their channel & contractors to install & maintain their products.</p> <p>Look For: Firms that service their own products, need to deploy tech service reps.</p>	<p>While virtually all building products firms will seek ERP integration, the use case is essentially always simple point-to-point, making it challenging for Mulesoft to price in.</p> <p>Look For: Corporate ETL tool needs for integration across multiple additional platforms.</p>	<p>Most BPM firms of any scale need true BI; this is most typically a corporate sale for analysis of data outside of Salesforce.</p> <p>Look for: Appetite for more sophisticated analytics without a capable legacy BI tool in place.</p>	<p>Savvy firms recognize the imperative to drive real adoption of the Salesforce platform through embedded training.</p> <p>Look for: Clients without an LMS alternative and with a mindset that embraces proactive change management.</p>

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