Haas
CASE STUDY

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Elevation Marketing delivers mobile sales
enablement app for Haas Automation, bridging
the gap between marketing and sales.

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.

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

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.
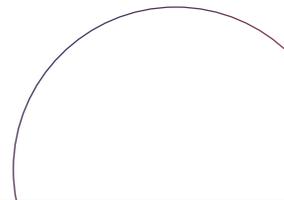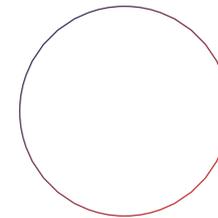
THE APP NEEDED TO TACKLE THREE AREAS OF FOCUS

1 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.

2 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.

3 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

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A Multilingual Sales Enablement Application

The solution is a multilingual sales enablement application for communicating 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.

Example 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

PRECONDITION	USE CASE	HIGH-LEVEL MAIN SCENARIO FLOW
Authenticated user, logged in	I am an HFO Salesperson and I want to show model-specific options and specifications to an existing client, so they can write a purchase order and I can check product delivery timelines	1. Access application from tablet in the field 2. Sign-in with credentials 3. Select product from menu navigation 4. View and select options desired 5. View specifications and pricing 6. Close app and/or logout
Authenticated user, logged in	I am an HFO Salesperson and I want to see the most popular configuration options for a product, so I can upsell an industry-proven product to my customer	1. Access application from phone in the field 2. Sign-on with credentials 3. Select product from menu navigation 4. View options by popularity for product selected 5. View specifications and pricing 6. Close app and/or logout
Authenticated user, logged in	I am an HFO Salesperson and I want to see pricing on a new product, so I can inform a prospect	1. Receive email from HFO Corporate Marketing Admin prompting me to establish my application profile and password, click link 2. Create accounts for sales teams, push invitations 3. Select from list of corporate approved product line/products which to display by each sales member from default of all products 4. Confirm and logout
Authenticated user, logged in with HFO settings privileges	I am an HFO Admin and I want to set-up our HFO application to display only the products we sell in our marketing, so my sales team can easily find only relevant product information	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 user management privileges	I am an HFO Admin and I want to add/delete users to reflect changes to our sales team, so former employees no longer have access to current product information	1. Sign-in with credentials 2. Navigate to administration interface 3. Select sales team member to delete 4. Confirm and logout

PRECONDITION	USE CASE	HIGH-LEVEL MAIN SCENARIO FLOW
Authenticated user, logged in with HFO analytic privileges	I am an HFO Admin and I want to report how our local team is using the application, so we meet corporate marketing objectives	1. Sign-in with credentials 2. Navigate to administration interface 3. See dashboard of metrics 4. Choose to export and/or distribute by email 5. Close window and/or logout
Authenticated user, logged in, rights to write privileges	I am a Haas Corporate Marketing Admin and I want to include a new product in the app, so my global sales force has a sales tool to spec the new product	1. Sign-in on desktop 2. Navigate to administration interface 3. Add new product information 4. Confirm and logout, triggering application update to all users
Authenticated user, logged in, rights to write privileges	I am a Haas Corporate Marketing Admin and I want to remove a product in the app, so sales reps stop placing orders for the product	1. Sign-in on desktop 2. Navigate to administration interface 3. Select product to delete 4. Confirm and logout, triggering application update to all users
Authenticated user, logged in, rights to write privileges	I am a Haas Corporate Marketing Admin and I want to set-up a new HFO to use the application within a defined geography to sell a defined product line	1. Sign-in on desktop 2. Navigate to administration interface 3. Add HFO profile information of name, HFO Admin user account and push invitation 4. Select product line/products authorized 5. Select primary language and currency 6. Define geographies (if appropriate) 7. Confirm and logout

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
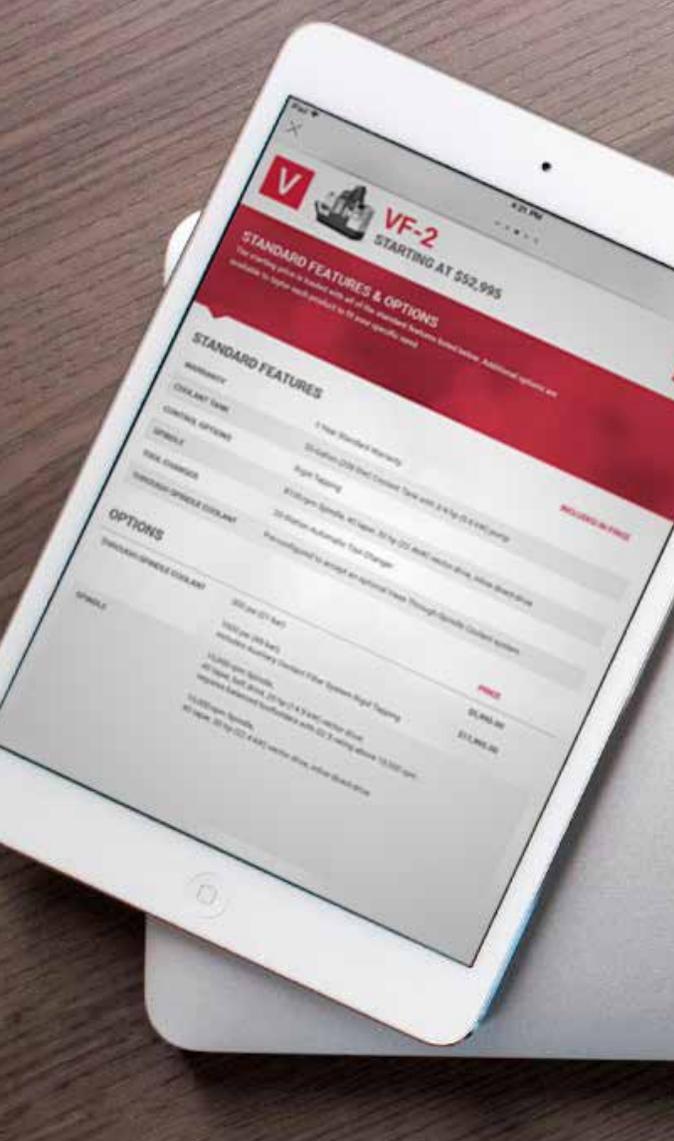
Sales Enablement Mobile App Speeds Sales Process Worldwide for Haas Automation

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.

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.

ELEVATION MARKETING DELIVERED A SALES ENABLEMENT TOOL **THAT EXCEEDED OUR EXPECTATIONS.**
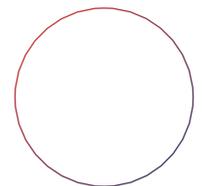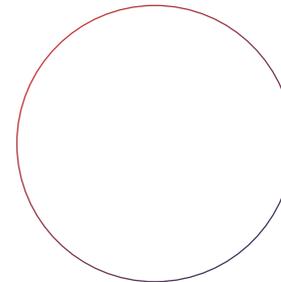
More Business Wins

ABOUT ELEVATION

Elevation Marketing is a full-service B2B marketing agency, providing exceptional client experiences that result in more business wins.

We go beyond tactics to inspire experiences that build brand believers. From a holistic perspective, we focus on all aspects of operations and strategy to ensure alignment between marketing and sales.

We have a strong command of inbound marketing, and know how to effectively manage, deliver and retain buyers. We offer full-cycle, web development services for the enterprise. We build bridges of communication, streamlining the dissemination of information to targeted entities.

Whether its partner portals, online stores, web apps or microsites, our custom digital solutions help you govern persona data through its entire lifecycle for superior lead generation and nurturing.

If you have a B2B product or service that solves real world problems, then you've done your job. We'll do ours by connecting you to the B2B decision makers that will benefit from what you have to offer.

Inc. 5000

Business Journal
Top 20
Interactive Marketing Firm

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