



HOW A FREE CRM CAN CHANGE YOUR FOODSERVICE BUSINESS

—
Why is customer data so important today? How to leverage the marketing to sales handoff with a CRM? How factories and reps are using it? And why not Salesforce?



ERIK MACPHERSON

TMC DIGITAL MEDIA

Erik is the founder and CEO of TMC Digital Media, an inbound marketing and sales agency specializing in the foodservice equipment industry.



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Why is customer data so important today? How to leverage the marketing to sales handoff with a CRM? How factories and reps are using it? And why not Salesforce?



FEATURING GUEST PANELIST:

JOHN PSZENNY

HubSpot

John is a Principal Channel Consultant at HubSpot and TMC's strategic partner. Together, John ensures TMC and our clients get the most out of their marketing and sales strategies.

TODAY'S TOPICS

2:00 — 2:15 PM
SETTING THE STAGE

WHAT IS A CRM?
Why It's All About The DATA

2:15 — 2:25 PM

CONTACTS & COMPANIES
From Marketing to Sales

2:25 — 2:45 PM

DEALS AND PIPELINES
Stages, By Product, Type and More

2:45 — 2:55 PM

SALES TOOLS
Knowledge is Power

2:45 — 2:55 PM

SERVICE TICKETS
And How to Automate The Process

3:00 PM

PEACE OUT 🕊️

B2B FOODSERVICE INDUSTRY

MANUFACTURER REPS



MANUFACTURERS



DEALERS/DESIGNERS



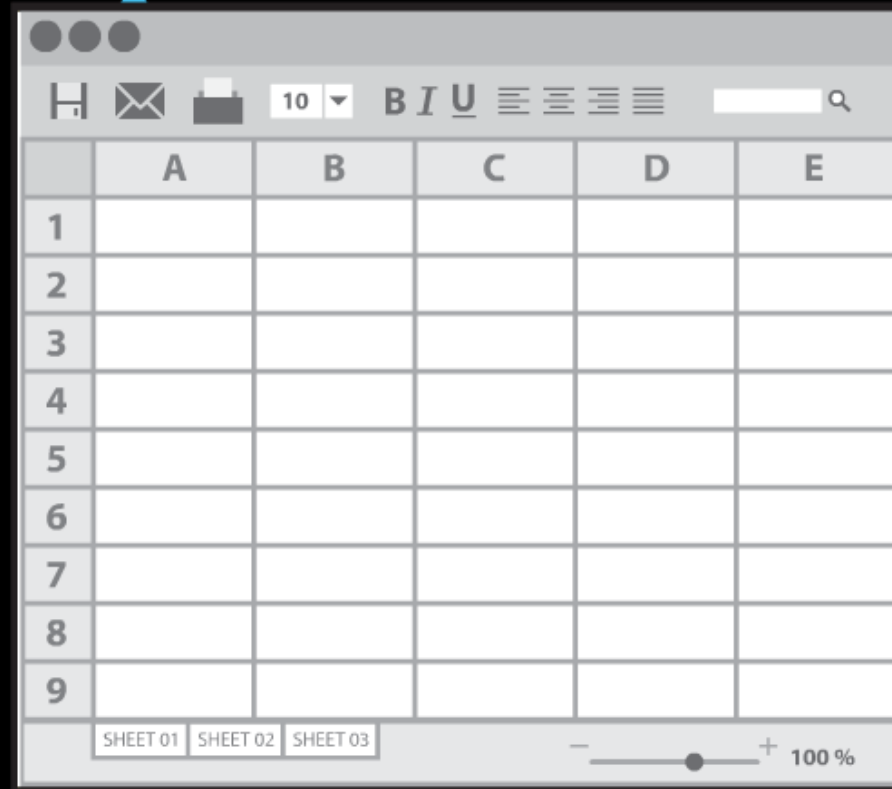
DISTRIBUTOR



IS THIS
YOU?



IS THIS
YOU?



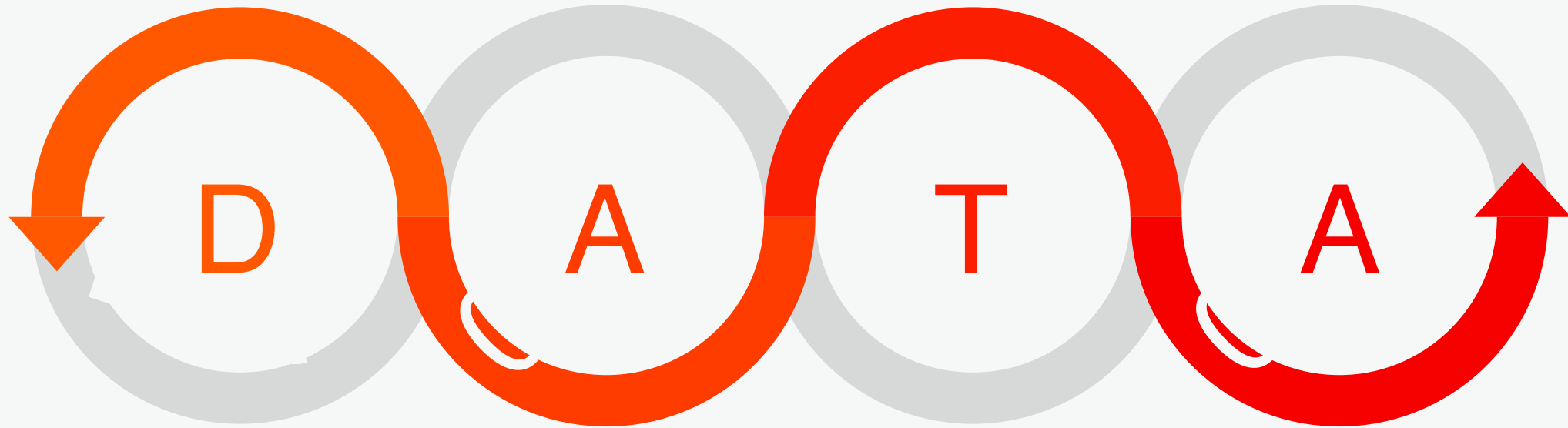
ROCKIN' THE NUMBERS



CRM =
DATA

CRM CUSTOMER
RELATIONSHIP
MANAGEMENT

CUSTOMER DATA - NEEDS TO BE SHARED



CXO LEVEL

Performance
Business Impact
HR

SALES & MARKETING

Website Data
Lead Generation/Intel
The Funnel/Pipeline
Sales Empowerment

CUSTOMER SUPPORT

Service Requests
Parts

PARTNERS/REPS

Leads
Technical Documentation
Dealer Information

CRM - WHY?



DATA IN ONE PLACE



SAVES TIME & RESOURCES



INCREASED VISIBILITY



EMPOWER SALES



ALIGN BUSINESS UNITS



TRULY UNDERSTAND YOUR CUSTOMERS

CRM - CONSIDER THIS

🎯 29%

CRM SYSTEM ADOPTION
INCREASES SALES BY UP TO
29%

🎯 63%

TOP MARKETING
CHALLENGE:
GENERATING TRAFFIC &
LEADS

🎯 82%

OF B2B DECISION MAKERS
THINK SALES REPS ARE
UNPREPARED

🎯 70%

COMPANY'S TOP MARKETING
PRIORITY:
CONVERTING LEADS TO
CUSTOMERS

THE GROWTH STACK



MARKETING

SALES

CRM



MARKETING:

TOP OF MIND
&
LEAD GEN

SALES:

CLOSING
AND TRACKING
DEALS

CRM:

THE ENTIRE
CUSTOMER
LIFECYCLE

MARKETING TOOLS



SALES TOOLS



CRM TOOLS

HubSpot

salesforce pardot



AQ AutoQuotes



ORGO SALES ENGINE

CallRail



WISTIA

LiveChat

Specifi™

KCL
BIM | CAD | MOBILE

specpath.

ATERO
Industrial Strength eCommerce



API INTEGRATION

 DIGITAL ECOSYSTEM

 DATA HAS TO BE SHARED

 DATA HAS TO BE ACCESSIBLE

HubSpot



Specifi™



HubSpot ALL-IN-ONE

 MARKETING - SALES - SERVICE
ALIGNMENT

 CUSTOMER HISTORY WITH YOUR
COMPANY

 DATA DRIVEN DECISION
MAKING



Free HubSpot CRM

Everything you need to organize, track, and build better relationships with leads and customers. Yes, it's 100% free. Forever.

POPULAR FEATURES

- ✓ Contact Insights
- ✓ Deals
- ✓ Tasks

[Learn More](#)

Marketing Hub

Marketing software to help you grow traffic, convert more visitors, and run complete inbound marketing campaigns at scale.

POPULAR FEATURES

- ✓ Lead Generation
- ✓ Marketing Automation
- ✓ Analytics

[Learn More](#)

Sales Hub

Time-saving sales software that helps you get deeper insights into prospects, automate the tasks you hate, and close more deals faster.

POPULAR FEATURES

- ✓ Email Tracking
- ✓ Meeting Scheduling
- ✓ Email Automation

[Learn More](#)**NEW**

Service Hub

Customer service software to help you connect with customers, exceed expectations, and turn them into promoters that grow your business.

POPULAR FEATURES

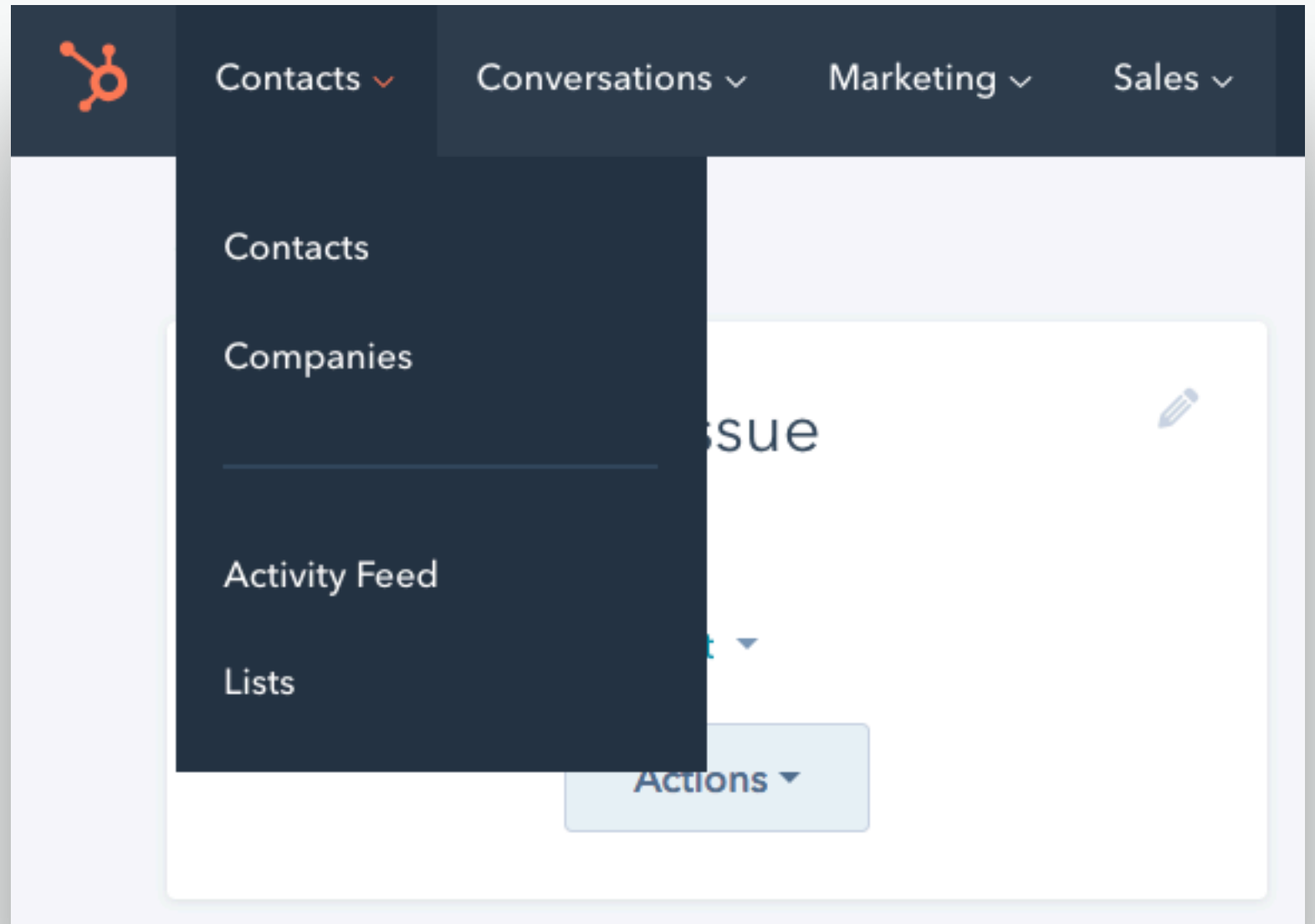
- ✓ Tickets
- ✓ Customer Feedback
- ✓ Knowledge Base

[Learn more](#)

WHERE DOES THIS FIT IN?



CONTACTS & COMPANIES



CONTACT DATA

CONTACT DATA



ENGAGEMENT DATA

ENGAGEMENT DATA

 LOG SALES ACTIVITY

LOG SALES ACTIVITY

- Contacts
- Conversations
- Marketing
- Sales
- Service
- Automation
- Reports
- Partner

TMC Digital Media

[Contact](#)

Sue Cerri

Pro Line Marketing Inc

Actions

Contact Top Times

[Contact Top Response Times](#)

Wednesday: 3 PM
Thursday: 12 Noon
Friday: 11 AM

[View more](#) [Actions](#)

Powered by Seventh Sense

About Sue Cerri

First name

Last name

Attended MAFSI 2018
☒

Became a lead date

Email

Phone number

New note | Email | Call | Log activity | Create task | Schedule

Start typing to leave a note...

A [Link] [List] [Lightbulb] [Pencil]

Activity | Notes | Emails | Calls | Tasks

June 2018

Filter activity (18/28)

Sue Cerri viewed page TMC Webinar Series - Technology and Today's Buyers - Foodservice Jun 19 at 1:49 PM EDT

[View details](#)

suec@prolinereps.com was sent the marketing email Another TMC Webinar! How a free CRM can save your sanity & your sales. 6/21 2pm. Jun 18 at 7:02 PM EDT

SENT DELIVERED OPENED CLICKED Clicks: 1 Details

suec@prolinereps.com was sent the marketing email TMC Webinar: How a Free CRM Can Change Your Foodservice Business Jun 13 at 3:01 PM EDT

SENT DELIVERED OPENED CLICKED Opens: 2 Details


[Help](#)

COMPANIES

COMPANY DATA



RELATED
COMPANIES
[PARENT/CHILD]

DEALS / SERVICE
TICKETS /
ATTACHMENTS

 Contacts ▾ Conversations ▾ Marketing ▾ Sales ▾ Service ▾ Automation ▾ Reports ▾ Partner ▾

🔍 ⚙️ 🔔 24 👤 TMC Digital Media ▾

< Companies

 Eaton Marketing
eaton-marketing.com 

Actions ▾


> About Eaton Marketing

> Contacts at Eaton Marketing

> Related Companies







> Deals

> Tickets (1)

>  Sales Navigator

> Attachments

> PandaDoc

 New note  Email  Call  Log activity  Create task  Schedule

Start typing to leave a note...


A ⌵ ☰ 🔦 ✎

Activity Notes Emails Calls Tasks

June - May 2018
No events matching current filters for May through June 2018

Show more

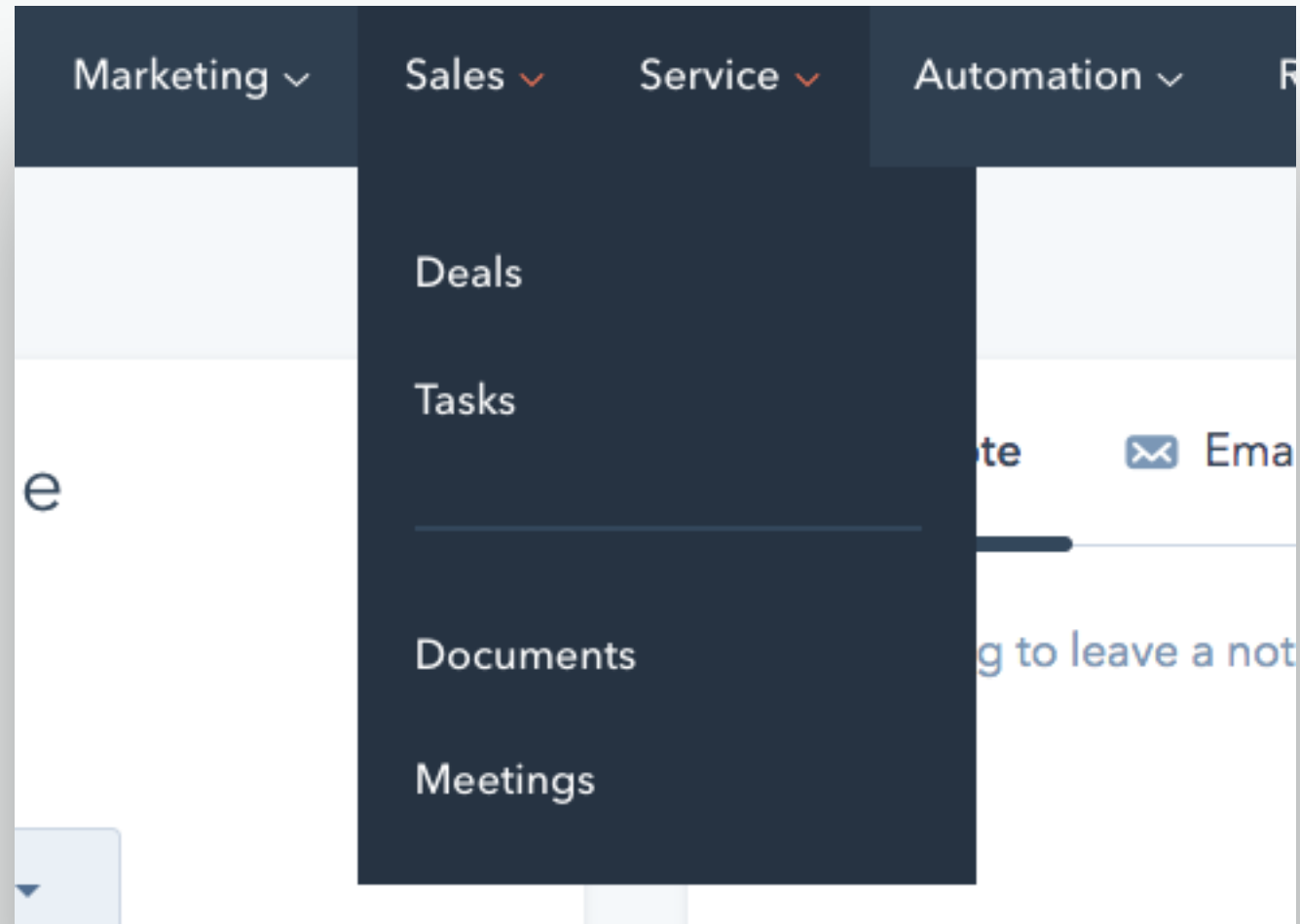
+

 Eaton Marketing was created
Feb 3 at 12:48 PM EST

Filter activity (0/9) ▾

Help

DEALS & PIPELINES



THE SALES PROCESS



CALL MANAGEMENT



OPPORTUNITY MANAGEMENT



ACCOUNT MANAGEMENT



TERRITORY MANAGEMENT



CUSTOMER SERVICE



OTHER?

WHICH APPLIES TO YOU?

THE DEAL STAGES - PIPELINE



FACTUAL



SEARCHABLE



BUYER-CENTRIC



REQUIRED/REPEATABLE



TRACKABLE



FORECAST-ABLE

WHICH APPLIES TO YOU?

DEALS & PIPELINES

DEAL STAGES

MULTIPLE PIPELINES

FILTER BY ANY KEYWORD OR PROPERTY

Contacts

Conversations

Marketing

Sales

Service

Automation

Reports

Partner

Search

Settings

26

TMC Digital Media

Deals

TableBoard

Search for a deal

Actions

Import

Create deal

All deals

All saved filters >

Pipeline

Rep Pipeline - Ex...

All deals

Options

+ Add filter

LEAD - APPOINTMENT NEEDED	0	QUALIFIED TO BUY	0	QUOTE CREATED	0	DEALER HAS QUOTE	1	END USER H
						<div>\$70,001 The Best Chain Restaurant - Location 1 Close date: June 30, 2018</div>		
Total: -		Total: -		Total: -		Total: \$70,001		

Help

DEALS & PIPELINES

COMPANY DATA

RELATED
COMPANIES

DEALS / SERVICE
TICKETS /
ATTACHMENTS

The screenshot displays a CRM interface for a deal pipeline. The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and Partner, along with search, settings, and notification icons. The main header shows the deal name "The Best Chain Restaurant - Location 1" and its amount, "\$70,001". Below this, a pipeline progress bar indicates the current stage is "Dealer Has Quote", with a close date of "06/30/2018". The left sidebar lists related entities: About The Best Chain Restaurant - Loca..., Products, Contacts, Company, Tickets, Attachments, and PandaDoc. The right sidebar contains a "New note" section with a text input field and a "Log activity" section with tabs for Activity, Notes, Emails, Calls, and Tasks. The Activity tab is active, showing a calendar view for June 2018 with a single event: "The Best Chain Restaurant - Location 1 was created" on May 9 at 9:20 AM EDT.

SALES TOOLS

Sales Hub Professional

[Talk to Sales](#)

For advanced sales teams. The complete sales toolkit, with artificial intelligence, advanced automation, and custom reporting.

FEATURES

- ✓ Gmail and Outlook integration
- ✓ Contact management
- ✓ Contact & company insights
- ✓ Company records
- ✓ Deals
- ✓ Tasks
- ✓ Email scheduling
- ✗ Email tracking & notifications
- ✗ Email templates
- ✗ Documents
- ✗ Calling
- ✗ Meeting scheduling
- ✗ Canned snippets
- ✗ Reporting
- ✓ Prospects
- ✓ Live chat
- ✓ Email sequences
- ✓ Phone & email support
- ✓ Teams
- ✓ Multiple deal pipelines
- ✓ Sales automation
- ✓ Predictive lead scoring
- ✓ Required fields
- ✓ Products
- ✓ Quotes
- ✓ Smart send times
- ✓ Smart notifications
- ✓ Salesforce integration

SALES TOOLS



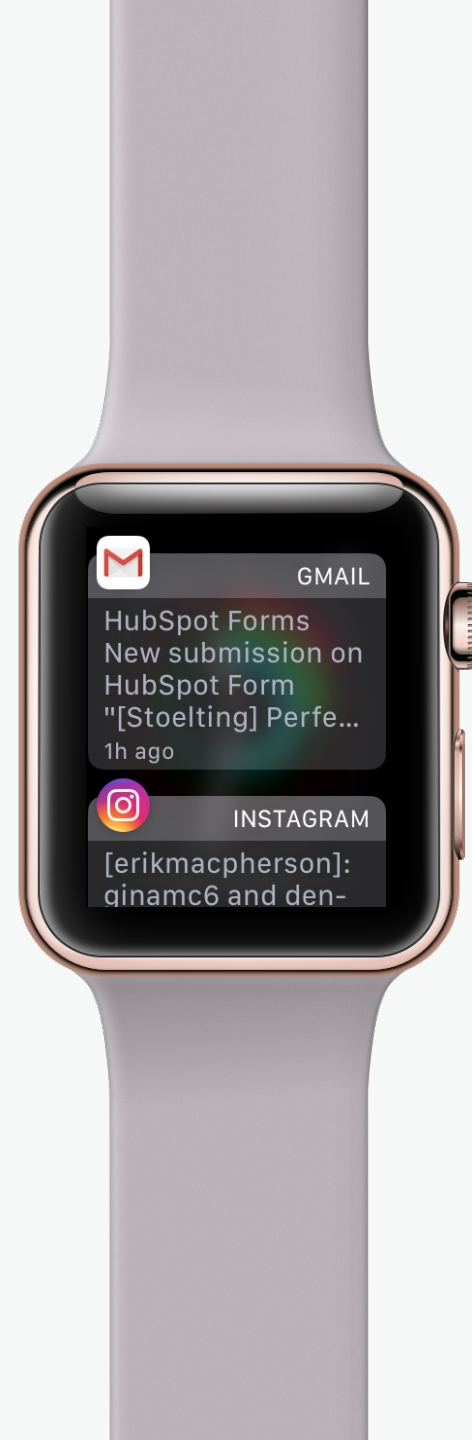
GET TIME BACK



BE EMPOWERED



FOCUS ON THE BEST
LEADS



SALES TOOLS - BE EMPOWERED - WHY?



STAY [BETTER] ORGANIZED



KNOW WHO IS INTERESTED



KNOW WHAT THEY ARE
INTERESTED IN



KNOW WHEN TO FOLLOW UP



KNOW WHY TO FOLLOW UP



BE MORE EFFICIENT

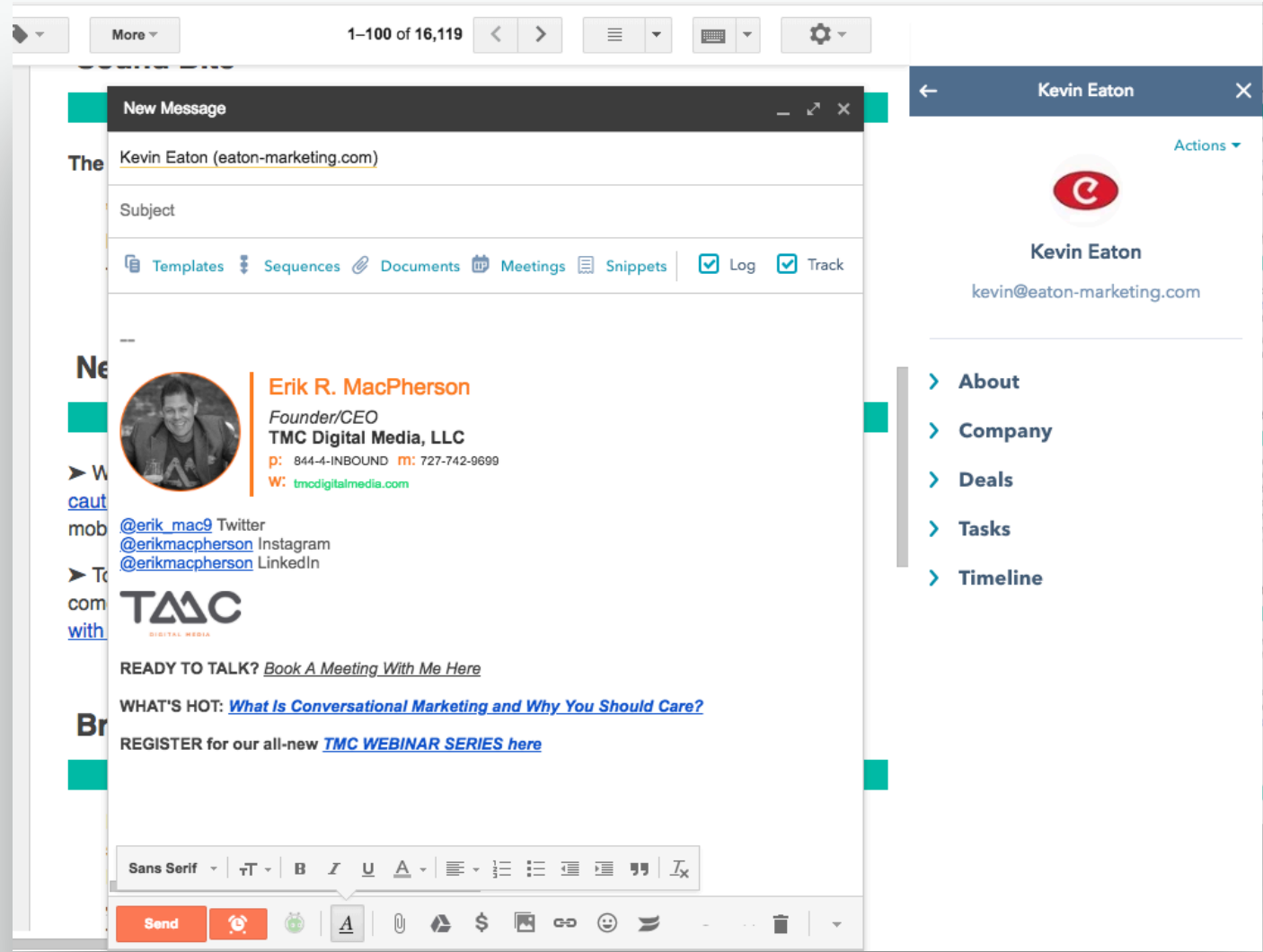
SALES TOOLS - HOW?

INTEGRATES DIRECTLY INTO GMAIL AND OUTLOOK

- TRACK EMAILS SENT
- TRACK EMAILS OPENED
- TRACK CLICKS IN EMAILS

SCHEDULE MEETINGS EASIER

TEMPLATES, SEQUENCES, SNIPPETS



SALES TOOLS - AUTOMATION



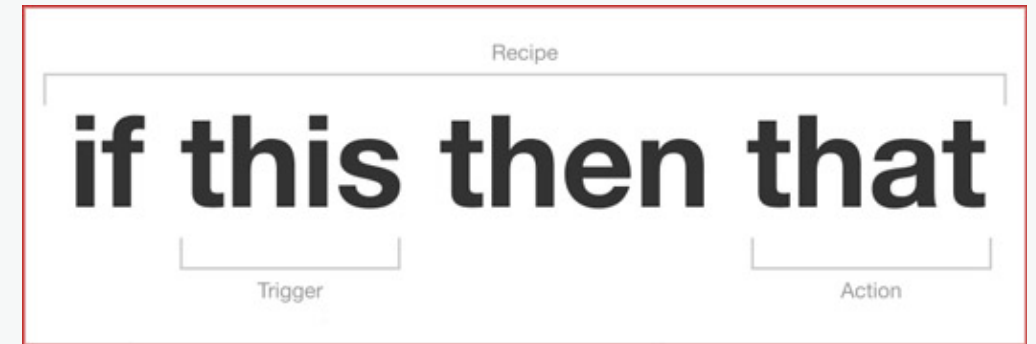
AUTOMATE EMAILS BASED
ON TRIGGERS



HAND-OFF FROM MARKETING
TO SALES TO CUSTOMER
SUPPORT



FOLLOW UP, REMINDERS,
TASKS



TAKE IT WITH YOU



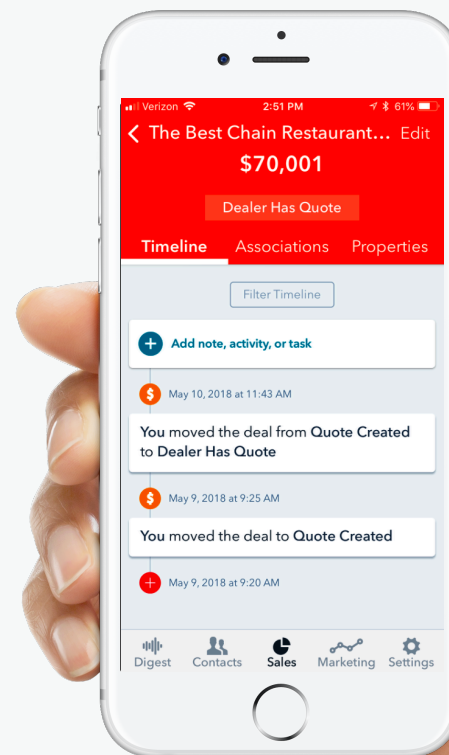
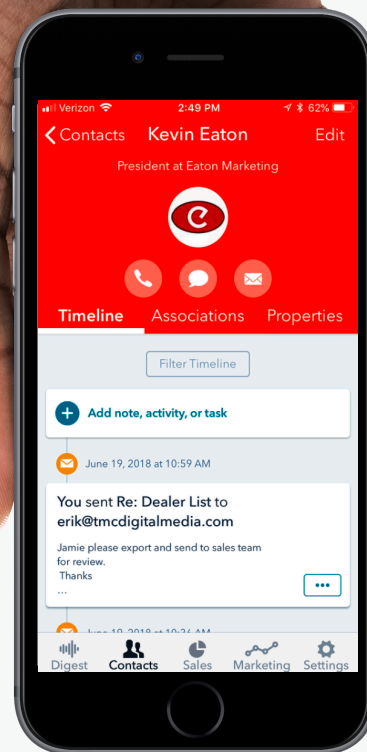
PHONES & TABLETS



ABE - ALWAYS BE
EDUCATING



SOCIAL SELLING
(JJJRH)



SERVICE HUB

Service Hub Professional

[Talk to Sales](#)

For customer service teams. Tools to connect with customers, exceed their expectations, and turn them into promoters that grow your business.

FEATURES

- ✓ Ticketing
- ✓ Customer feedback
- ✓ Knowledge base
- ✓ Live chat
- ✓ Conversational bots
- ✓ Conversations dashboard
- ✓ Team email
- ✓ Automation & routing
- Reporting
- ✓ Contact management
- ✓ Contact & company insights
- ✓ Company records
- ✓ Gmail and Outlook integration
- ✓ Email scheduling
- Email tracking & notifications
- Email templates
- Email sequences
- Documents
- Calling
- Meeting scheduling
- Canned snippets
- ✓ HubSpot branding removed
- ✓ Salesforce integration
- ✓ Phone & email support

SERVICE HUB

SERVICE TICKETS

END-TO END
COMPLETE VISIBILITY

KNOWLEDGE BASE

CUSTOMER FEEDBACK

The screenshot displays the Service Hub interface for a ticket titled "Perlick Faucet Issue". The top navigation bar includes links for Contacts, Conversations, Marketing, Sales, Service, Automation, Reports, and Partner, along with a search icon, settings, a notification bell with 26 alerts, and the user profile for TMC Digital Media.

The ticket details on the left show it was opened a month ago, with a status of "Waiting on contact" and an "Actions" button. The "About this ticket" section lists the ticket name, description ("needs replacement"), owner (Erik MacPherson), creation date (05/11/2018 10:55 AM EDT), last customer reply date (05/17/2018 2:40 PM EDT), and ticket ID (234910). Buttons for "View all properties" and "View property history" are at the bottom of this section.

Below the ticket details are sections for "Deals" and "Company".

The right-hand side of the interface features a "New note" button and a list of actions: Email, Call, Log activity, Create task, and Schedule. A text input field prompts the user to "Start typing to leave a note...". Below this is a rich text editor with formatting options (A, bold, italic, link, unlink, list, indent, outdent, undo, redo).

The "Activity" tab is selected, showing a timeline of events for June 2018. The first event is an email sent to Kevin Eaton (kevin@eaton-marketing.com) on June 19 at 10:36 AM EDT. The email status is "Opened", with 13 opens and 0 clicks. The subject is "Re: Dealer List" and the CC includes team@tmcdigitalmedia.com and jamie@eaton-marketing.com. The body of the email states: "This is the Master Dealer List - click here: https://app.hubspot.com/contacts/458550/lists/84". It also includes a disclaimer: "This doesn't mean that everyone is receiving the emails though - i.e. if they filter it out as spam, etc. You". A "View thread (2)" link is provided. The second event is an email received from Jamie Warticki (jamie@eaton-marketing.com) on June 19 at 9:18 AM EDT.

A "Filter activity (7/8)" button is located at the top right of the activity list. A "Help" button is visible in the bottom right corner.

WEBINAR FEEDBACK



<https://tmcdigitalmedia.com/webinar-thank-you/>

THANK YOU!

