



Regional Sales Challenge  
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## Case Analysis Scenario

Prospecting is one of the most time consuming and difficult tasks a sales professional will face. Although sales textbooks often list handling rejection as the hardest part of a sales professional's job, prospecting may be more difficult for many sales people because it is often a lonely task that involves hours of research. The research methodology is often highly industry specific and ascertaining the actual decision maker in the business to business context is often opaque (at best).

The Love's Fleet Sales division engages in prospecting of commercial trucking companies. There are a number of methods that Love's utilizes. Ninety-nine percent (99%) of trucking companies, from small operations to large scale over the road (OTR) major carriers, utilize fuel cards to purchase fuel. These cards are swiped (much like your credit card that you use at the pump) when drivers fuel at a Love's. This provides Love's with raw data in the form of a company name. Companies that are not frequent customers of Love's may be identified with this information, and Love's does use this information to provide prospects to the fleet sales and factoring sales divisions. However, the information gathered utilizing this method is very raw. It does not provide details such as the company's owners name, or if corporate, their principal officers. Further, it does not provide information regarding the size of the fleet, type of carrier, or the total mileage the company drives per year. Thus, the sales person must dig to find this information from a variety of other sources. Love's would like to develop a method to streamline this category of prospecting. For example, what internet sources (including social media) should they utilize to identify decision influencers and decision makers?

In addition to the fuel card swipe method detailed above, Love's also utilizes industry specific data aggregating companies such as Fleet Seek (<https://fleetseek.com/>), Carrier 411 (<https://www.carrier411.com/>), and Rig Dig (<https://www.rigdig.com/>). These sources provide a greater level of detail, and are therefore of greater value to Love's. You can see an example of the data provided to Love's by Fleet Seek in Exhibit A which is an Excel spreadsheet that has been aggregated by Fleet Seek by searching for trucking company parameters for the beautiful Las Cruces, New Mexico area. For the purposes of this case study, Caleb Thompson, an inside

sales manager for Loves, pulled all the data available within a ten (10) mile radius of Las Cruces, NM. While all of the data may be helpful to you in your analysis, pay close attention to the following columns:

- Columns G, H, I, & J provide you with the full name of a company contact.
- Column K provides you with the title of the contact
- Column BF provides the total vehicles for the company
- Column BG provides total vehicles owned
- Column BH provides total vehicles leased
- Column BL disaggregates vehicles in that it specifies how many tractors the company has; tractors are the commercial trucks that pull trailers or other implements of cargo
- Column BY lists the carriers' type of organization (e.g. general freight, petroleum, mobile homes).

According to Caleb Thompson, while the information provided by sources such as Fleet Seek is extremely valuable, it can still have issues. For example, the contact name is often pulled by Fleet Seek from publicly available information from United States Department of Transportation filings and this information is often not up to date. Further, even if the information is correct, the individual listed may not be the actual decision maker. Although the company president is often listed, in many instances with regard to fuel purchases, a lower level company officer or manager may have decision making authority. Another frequent problem is that the individual listed may no longer be with the company.

In addition to the issues with the data noted above, Todd Wilson, Director of Fleet Sales for the Western United States, recently had an interesting and problematic performance review with one of his sales people Bob McKaiser. While Bob's performance numbers are good (not exceptional), Todd noticed that most of Bob's sales were to smaller fleets. When Todd questioned Bob about this, Bob said that he was interested in maximizing his commissions and that it was easier to do this by focusing on small fleets that had fewer decision makers. Bob followed that observation by saying that, "it's easy to squeeze the little guys. They pop like a grape, especially when I sell them on our factoring program." The factoring program is detailed on CSI's web under the Product/Scenarios tab by clicking on the Fleet Sales Video's icon. Needless to say Todd was taken aback by Bob's unbridled candor, and he decided that Love's

needed to update their prospecting training program while ensuring that it included an ethical awareness component. While what Bob is doing is not illegal, nor is it against company policy (at this point in time), his behavior is ethically problematic in that it not only affects Love's corporate performance (recall that Bob was really only interested in maximizing his commission, which ignores other stakeholders such as the company itself, its customers, other employees that rely on Love's for their livelihood, company suppliers, and the communities Love's serves), but could also affect customer needs and Love's image if Bob's attitude turns out to be widespread.

Assume that you are a recent graduate from a top sales program in the nation. You have recently been hired by Love's, and they have asked you to help develop a new prospecting program. Since you have recently graduated, management believes you and your fellow new sales professionals may have more up to date ideas about how to engage in prospecting based on your academic training. Further, because you are new to the field, Love's believes that you will not be biased by a "been there, done that attitude" that tends to infect sales people that have been in the field for a great deal of time. Your challenge is to develop a prospecting training program that seeks to maximize efficiency in the prospecting process while maintaining a high ethical standard. To accomplish this goal, you should consider how to use the data to determine a prospect's social style and psychographic profile. Further, how can such a program include an ethical awareness component? You and your team will develop a presentation and present it to a group of corporate managers.