



# DATA:

## What Do You Have and WHAT CAN YOU DO WITH IT?

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September 24  
1 – 2 pm EST

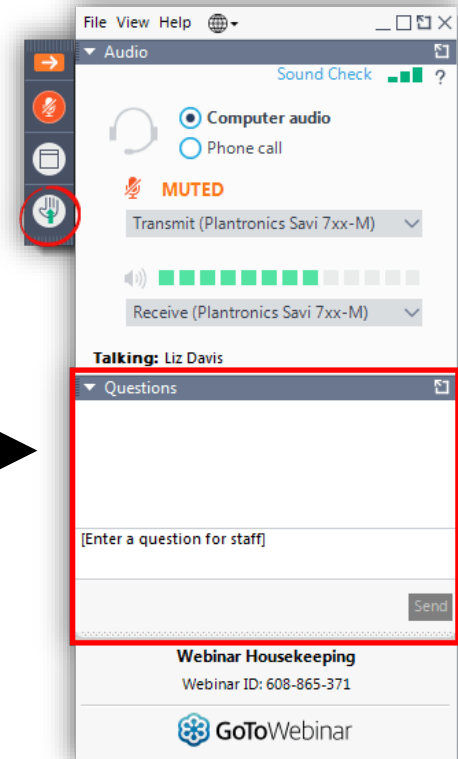
# Housekeeping



**Today's web seminar is being recorded.**



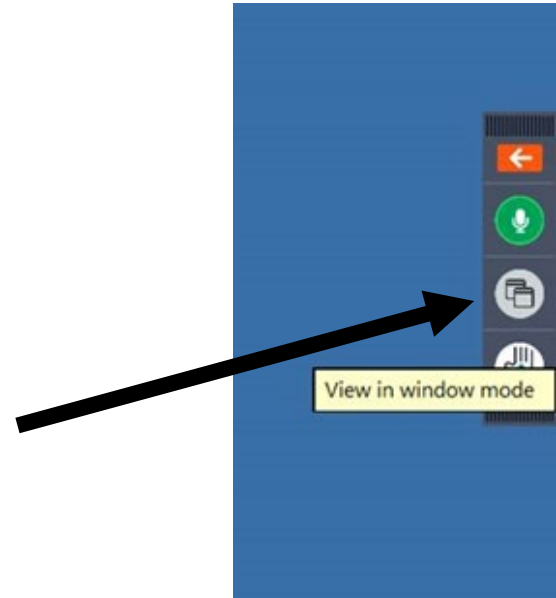
**All questions should be submitted via the Questions Panel.**



# Polling

If viewing the webinar in FULL SCREEN MODE, you will need to convert your screen to VIEW IN WINDOW MODE for the polling.

On your attendee control panel, the 2<sup>nd</sup> button will convert your screen



# Welcome and Introductions



**Colleen Shelby**  
CEO



**Danielle Dolloff**  
EVP of Sales and Marketing



**Alistair Canal**  
President



**Kellie Nienaber**  
Executive Director















# Question #1

We can often get stuck in thinking data can only be found within our own systems, or stored information, but the reality is, there is data that can be found from so many other sources.

Can you share some external data that might be available and where can we find it?

# External Data Examples

 <b>EXPERIAN</b> 	Business credit reports
   	Credit and background check info
 <b>DECISION LOGIC</b>	Bank statements
 <b>MIDDESK</b>	API portal pulls for OFA, SOS
	Payment performance, international business data
 LexisNexis™	Public data on bankruptcies, liens, felonies
<b>BLOOMBERG</b>  <b>REUTERS</b>	Financial news, economic indicators
	Info on truck fleets and truck history
	Data on equipment sales, pricing trends
	Current market prices

# Polling Question #1

Do you currently access external data? If so, what data sources do you use?

- A. Equipment Leasing and Finance Association and the Equipment Leasing & Finance Foundation
- B. Other industry data sources
- C. No, I do not access any data

## Question #2

Are there key business questions that companies should consider when doing data analysis?

Is there anything you might suggest that companies should do ahead of time before they just start collecting data?



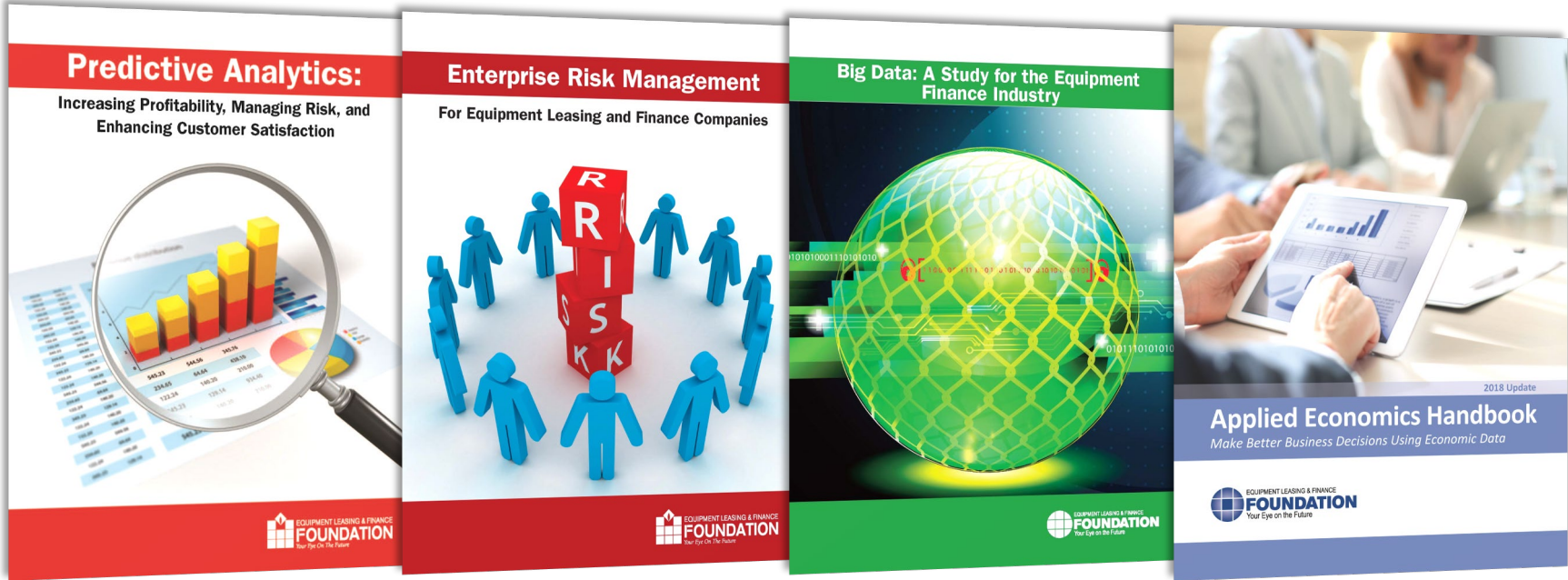
## Polling Question #2

Do you currently have data queries you access through your company?

- A. Yes, we have queries and reports that we use
- B. Yes, we have queries and data reports that I DO NOT use as they are not helpful to me
- C. NO, our company does not utilize the data we collect

## Question #3

Once you've accessed data that you believe can address some of the business insights you are looking for, how do you begin to integrate those insights into your decision-making processes?



## Polling Question #3

Is there anything you're already getting curious about in terms of action you can take to help grow your bottom line?

- A. We have data and information we can better use to help us make important decisions for future growth
- B. Accessing external data and outside resources will help us make smarter decisions about strategic planning
- C. We can be better about how to consider key metrics to pull data and access reports that will truly help us in our decision making

## Question #4

Ultimately, how can the analysis of data, and the evaluation of insights derived from data change your decision making?

What suggestion or ways can you impact your budget, or your strategic planning to make just one change a month that might lead to a small percentage of additional revenue?

# Case Study

## Salesperson Productivity

### Measured

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- Active hours
- Number of calls and texts
- Leads created
- Calls per opportunity
- Origination dollars
- Opportunities created
- Opportunities with SSN
- Number of days at current stage
- Days since last interaction
- And more. . . .



# Case Study

## Salesperson Productivity

### Reporting Features

- Visual Reports: Graphs, Charts, and More
- Highlighted Data for Quick Opportunity Identification
- Time-Based Trend Analysis
- Clickable Drill-Down reports
- Reports for Both Executive and Salesperson Levels
- Daily Kickoff Reports

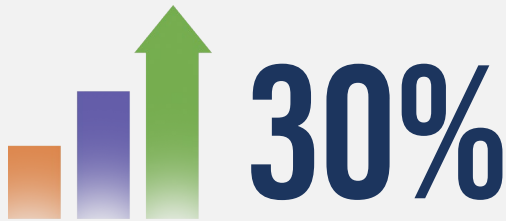


# Case Study

## Salesperson Productivity

### Results

Increased salesperson productivity by



- **Improved success of new salespeople**  
consistent oversight = better coaching
- **Enhanced team collaboration between departments**  
using data to identify process gaps
- **Better results from underperformers**  
early intervention led to quicker improvements
- **Clarity of goals and priorities**  
helped sales team to focus



# Q&A



# What's Next?



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