

IBISWorld Call Prep Insights for Salesforce

User guide

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Why use Call Prep Insights?

Elevate your sales calls without leaving Salesforce. Call Prep Insights offers:

Easy meeting prep for stronger engagement

Get instant access to the industry information you need in the system you're already using. Learn about a client or prospect's industry in minutes so you can better understand their competitive environment, pain points, opportunities and threats. Industry expertise helps you tailor your talking points to have more productive, better-informed conversations and build rapport.

Personalize your experience

Customize the IBISWorld data your organization sees in your Salesforce environment to best suit your unique use case. Admins can make changes to these preferences at any time without requiring updates to your Salesforce configuration.

More data for sales process management

Write IBISWorld data and insights to custom fields in Salesforce objects for better reporting and pipeline management.

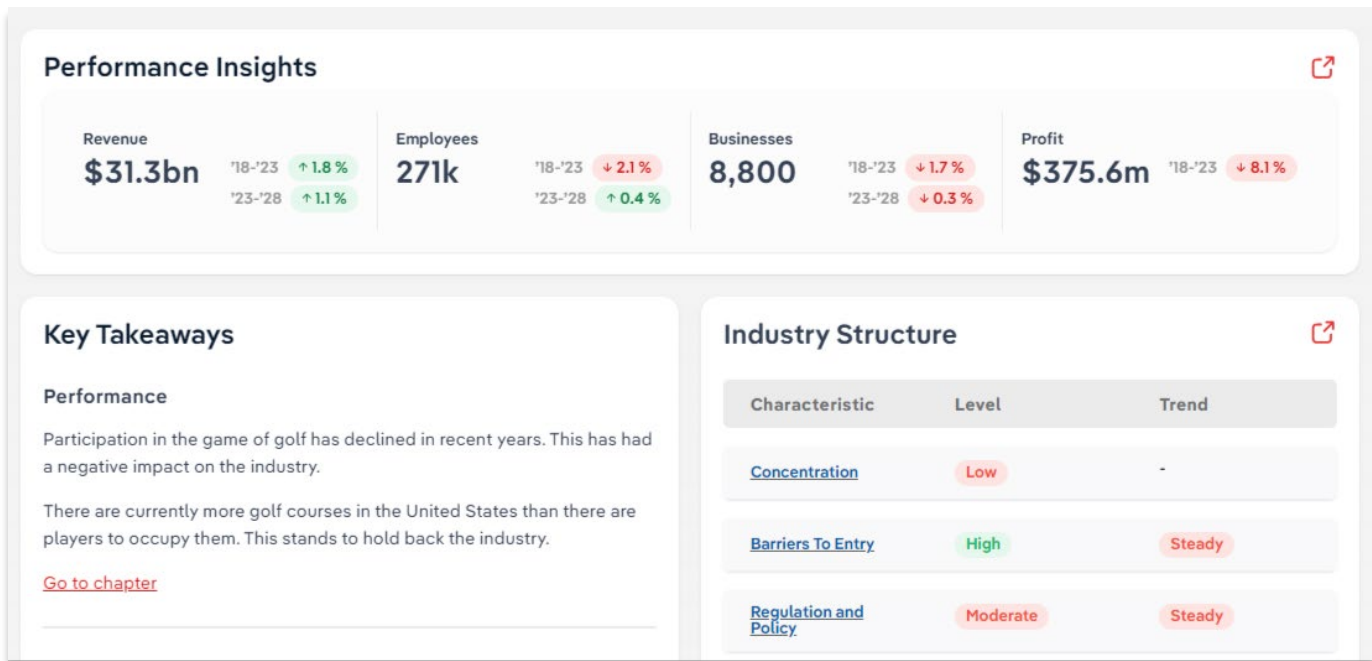
Improved mapping

Take advantage of automatic mapping to assign industry codes to leads, opportunities and accounts. Use Salesforce's native reporting functionality to sort based on this data to better understand and qualify your ideal customer profile (ICP), shorten lead cycles and improve lead scoring.

Key features

Overview

Learn about your client or prospect's industry and find relevant talking points across key elements of their operating environment.



- **Performance Insights and Key Takeaways:** High-level insights into key performance trends and external factors.
- **Industry Structure:** A summary of the major factors that shape the industry environment, like competition, regulation, government assistance and volatility.
- **Industry Performance:** Revenue, employment, businesses and profit trends, including five-year forecasts.
- **Products & Services:** A breakdown of key product and service lines and their contribution to industry revenue.
- **Life Cycle:** A comparison of the industry's life cycle stage (quantity growth, quality growth, maturity or decline) to similar industries.
- **Major Markets:** Key industry markets and their contribution to industry revenue.
- **Business Concentration:** A heatmap showing which states have the highest concentration of establishments, revenue, employees and wages.
- **International Trade:** Data on the industry's key import and export markets (where applicable).
- **Market Share:** A breakdown of the largest industry players and their share of revenue.

- **Supply Chain:** A list of buyer and supplier industries.
- **Key Success Factors:** The crucial factors that set successful businesses in an industry apart from their peers.

Call Preparation Questions

Prepare for meetings and outreach with insightful questions tailored to specific roles across five business areas, plus industry-focused internal and external issues. Each question includes valuable context to help you prepare for your client or prospect's responses and better understand their pain points and opportunities.


Call Preparation Questions

Sales & Marketing

Strategy & Operations

Technology

Compliance

Finance

Internal Issues

External Issues

Sales & Marketing

How well does your company market to consumers with limited leisure time?

- Golf courses and country clubs often struggle to appeal to consumers with limited leisure time since a round of golf is time-consuming. Some have attempted to appeal to time-strapped consumers by offering smaller courses and ancillary services.

Does seasonality affect sales for the products and services your company offers?

- Seasons have a strong effect on industry demand since most consumer demand for golf is in the warm summer months.
- Courses that are located in states with mild climates year-round, typically are able to operate throughout the year. Courses that are more affected by winter weather, will likely limit operations during the off months.

Financial Data

Use key metrics to get a sense of the industry's financial performance. Compare data and ratios to the sector average or your client or prospect's financials for easy benchmarking.

Financial Ratios

Days' Receivables
38.8
Lower than sector

Interest Coverage
65.5
Lower than sector

Debt/Net Worth
1.8
Lower than sector

<

Cash Flow & Debt Service Ratios (% of sales)

Liquidity Ratios

Leverage Ratios

Coverage Ratios

>

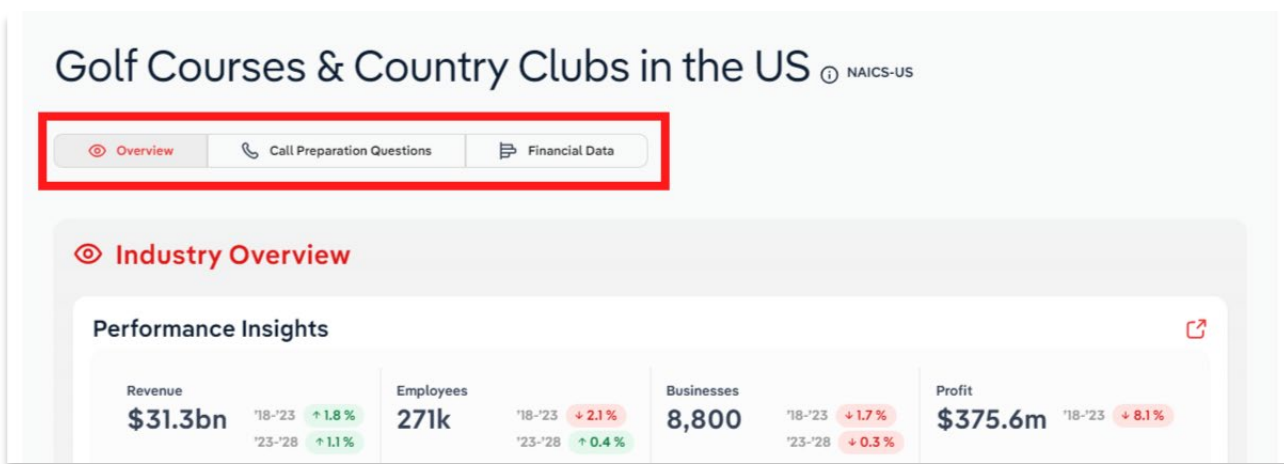
Liquidity Ratios

Ratio	2018	2019	2020	2021	2022	3-Year	5-Year	10-Year
Current Ratio	1.6	1.8	1.5	1.8	1.7	1.7	1.7	1.5
Quick Ratio	1.5	1.7	1.3	1.4	1.2	1.3	1.4	1.3

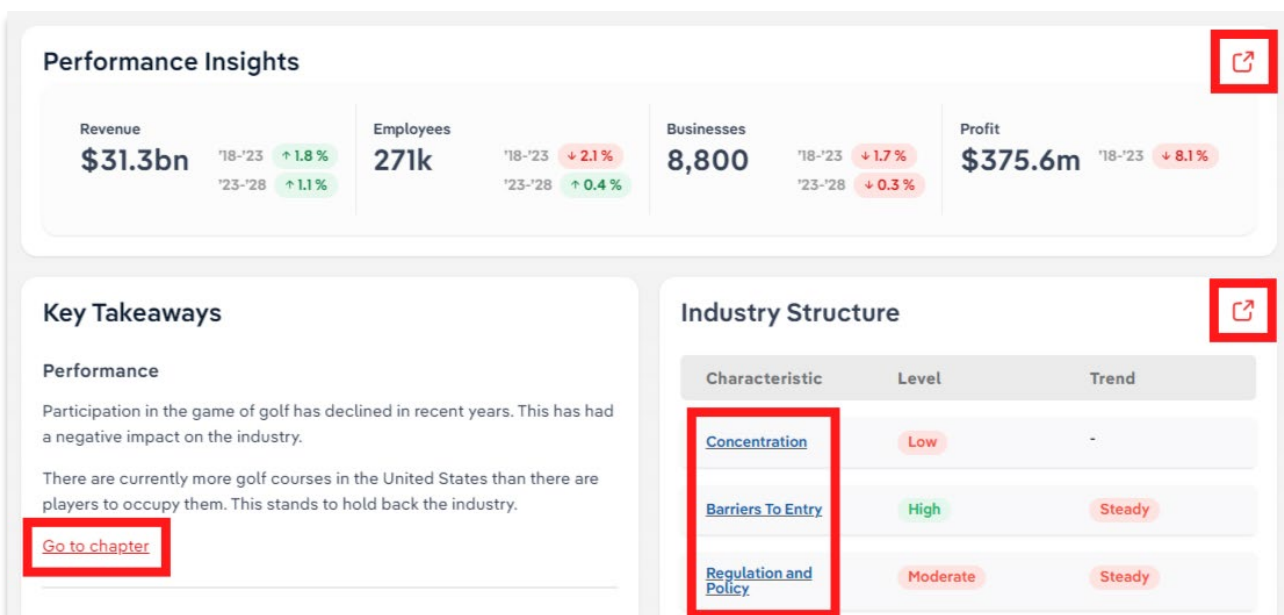
Basic User Navigation – All Objects

Follow the below instructions to navigate any Lightning Page with the Call Prep Insights app.

- Switch between sections using the 3 tabs at the top of the app:
 - **Overview** summarizes major data and trends for the industry.
 - **Call Prep Questions** includes role-specific questions to illustrate knowledge of a market.
 - **Financial Data** features key ratios and industry benchmarks.



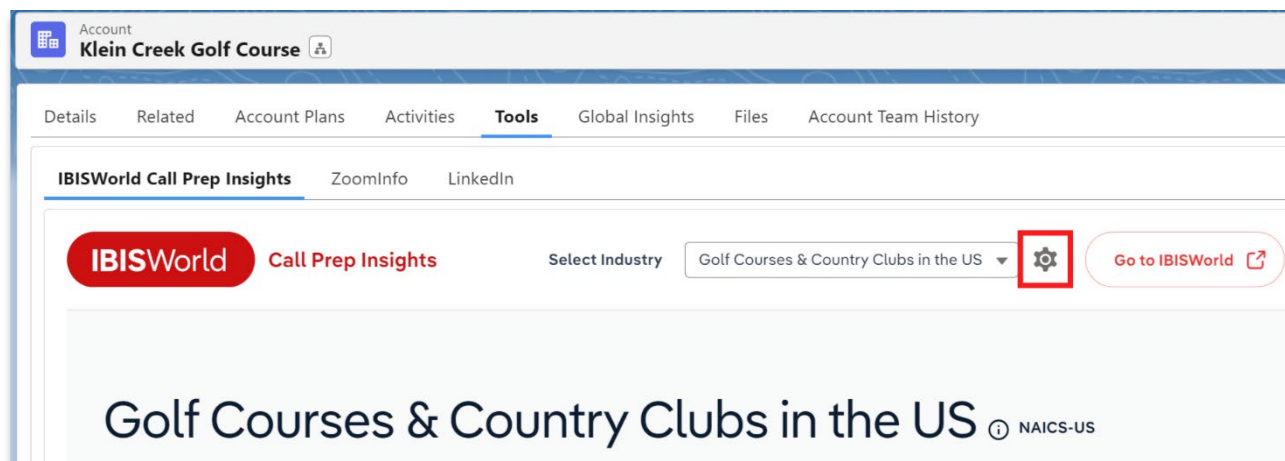
- Use external navigation icons and text hyperlinks to open the industry report within the IBISWorld client platform.



Mapped Report Management

Call Prep Insights should automatically map to an IBISWorld report. If a map is unsuccessful or you want to add industries to better capture a company's range of business activity:

1. Click the gear icon



2. Select “Add an Industry” to search by keyword, industry title or industry classification code.



3. Search for an industry, then select which reports to add to the map and click 'Add.'

recreation Search

ALL REGIONS UNITED STATES CANADA

☐ 71 - Arts, Entertainment and Recreation in the US US

☐ 44121 - Recreational Vehicle Dealers in the US US

☐ 45111 - Sporting Goods Stores in the US US

☐ 71394 - Gym, Health & Fitness Clubs in the US US

☐ 71391 - Golf Courses & Country Clubs in the US US

☐ 72121 - Campgrounds & RV Parks in the US US

0 industries selected Cancel Add

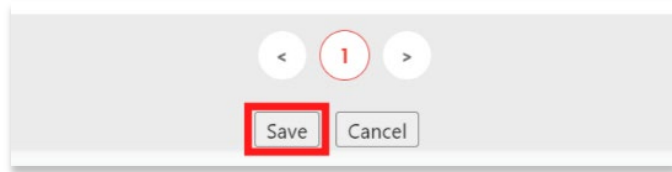
4. From the mapped industry report list, select a default report to appear upon load.

Industry Name ▾	Code ▾	Default ▾	Remove
Golf Courses & Country Clubs in the US US	71391	☒	
Golf Courses & Country Clubs in Canada CA	71391CA	☐	

5. Remove any unwanted mapped industry reports using the trash can icon.

Industry Name ▾	Code ▾	Default ▾	Remove
Golf Courses & Country Clubs in the US US	71391	☒	
Golf Courses & Country Clubs in Canada CA	71391CA	☐	
Golf Courses & Country Clubs in Canada CA	71391CA	☐	

6. Click 'Save' to navigate back to Call Prep Insights.



7. Navigate through mapped industry reports using the dropdown at the top of the app.

