



WHO ARE YOU  
WORKING SAFE FOR?

# Case Study

**H HODGE & Concept.**

## INTRODUCTION

### Enhancing Operations And Efficiency

In today's dynamic business environment, leveraging technology and streamlined processes can significantly improve operational efficiency. This case study explores the journey of Hodge, a material handling and logistics company, and how targeted solutions improved their operations and delivered impressive results.

## CLIENT BACKGROUND

### Transforming Operational Processes For Hodge

Hodge sought to modernize its operational processes, improve communication, and enhance visibility across departments. The company provides services including material handling equipment sales and service, third-party logistics & warehousing, and real estate development. With over 60 years of experience, Hodge employs over 800 employees across five states - Iowa, Illinois, Wisconsin, North Carolina, and Georgia. By partnering with Concept, Hodge aimed to address these challenges and streamline their operations.

## CHALLENGES

# Overcoming Operational Hurdles

Hodge faced several key challenges impacting their efficiency and service delivery:



### Managing Inventory:

Difficulty in managing new and used equipment purchases, rental requests, and overall equipment needs, leading to communication and visibility challenges across departments.



### No Visibility to Market Intelligence & Territory:

Lack of visibility into key marketing intelligence and limited access for multiple sales reps to accounts.



### Outdated Process for Credit Apps & Demo Requests:

Customer demo requests and credit applications were handled on paper, lacking visibility and efficiency across departments.



### Improving Communication & Inventory Visibility:

Struggled with effective and timely communication across various departments and locations for new/used inventory, rental inventory, credit applications, and demo requests.



STRATEGIC APPROACH

# Streamlining Processes And Enhancing Visibility

Concept partnered with Hodge to create processes and implement technology solutions that would enhance their operations and communications:



### Implementing Material Handling Accelerator & Territory Management:

Concept integrated these solutions into Hodge's CRM to capture relevant data points, build a strong pipeline, and ensure visibility in managing parts or service sales.



### Creating Streamlined Processes for Credit Apps & Demo Requests:

Developed a streamlined process for demo requests and credit applications, automating approvals and integrating systems for better management and visibility.



### Developing a Used Equipment Tool:

Created a centralized tool within Salesforce to manage the used equipment process, enabling faster and more efficient customer service.



## RESULTS

# Driving Operational Improvements



As a Salesforce partner, Concept enabled Hodge to improve their efficiency with tailored solutions for inventory and process management.

### Completed Projects

**260+**

Completed Projects

Demonstrated Hodge's capability to handle diverse projects efficiently.

### Projects within Budget

**97%**

Projects within Budget

Ensured financial efficiency and effective budget management.

### Repeat Business

**90%**

Repeat Business

High client satisfaction and loyalty.

### Certified Resources

**100%**

Certified Resources

Skilled workforce ensuring quality service delivery





**H** HODGE & Concept.

IN CONCLUSION

## Achieving Operational Excellence

By leveraging targeted technology solutions and streamlined processes, Hodge significantly improved its operational efficiency and service delivery. This case study highlights the transformative impact of strategic interventions, showcasing Hodge's journey towards enhanced visibility, better communication, and overall operational excellence.