

Show Me the Data: How to Better Use Data to Drive Revenue Growth

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WAVES of **INNOVATION**
TOGETHER WE RISE





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The background of the slide features a collage of various data visualization elements, including bar charts, line graphs, and pie charts, all in shades of blue and white, creating a professional and analytical aesthetic.

“By 2026, 65% of B2B sales organizations will transition from intuition-based to **data-driven decision making....**”

Gartner (2024)

“By 2027, B2B organizations that
**unite key performance
indicators and analytics**
to align the execution of
commercial functions
**will improve customer
retention and growth
by 50%.”**

Gartner (2024)







“Commercial organizations are **awash in data**, but they can easily lose sight of the right questions to ask and the best ways to act on the answers...

...Ironically, the net result of this flood of information is a **drought of insight.**”

Gartner (2023)

In this session, we will explore how to better use data to drive revenue growth



Develop Data	Determine KPI	Drive Results with CRM &SFA	Dig Into Installed Base
Slides 9 - 17	Slides 19 - 26	Slides 28 - 35	Slides 37 - 43
			





Develop data

How mature is your organization's data?



Where organizations *want* to
be in analytics



Where organizations *typically*
are in analytics



Can you answer all of these questions for your business?

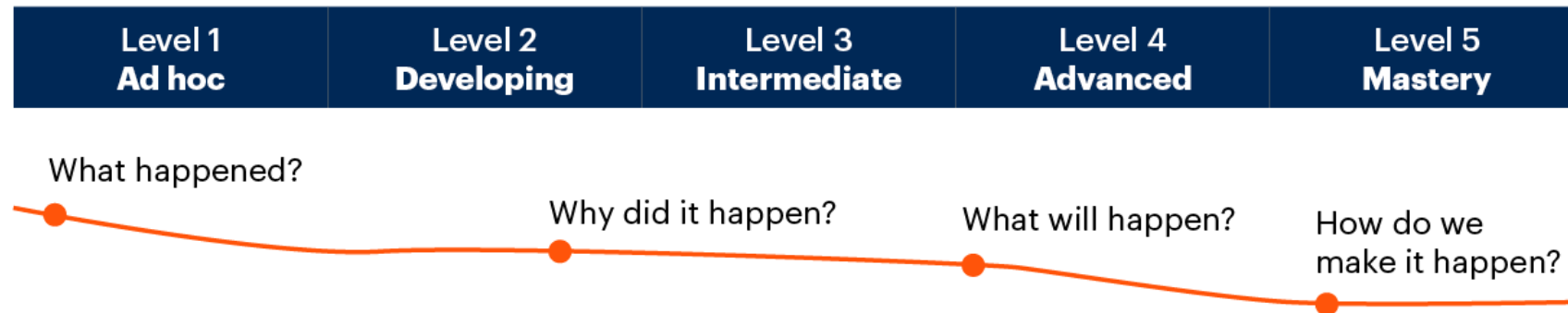
Analytics Maturity Model



Milestones Along the Analytics Maturity Journey

Illustrative

— Time from analysis to insight



Source: Gartner
800106_C

Gartner



All analytics and insights
start with data

The more mature your data, the more advanced analytics you can do

There are 3 widely accepted types of data / analytics



Descriptive

What happened?

Why did it happen?



Predictive

What will happen?



Prescriptive

How can we make it happen?

What should be done?

Least mature



Most mature

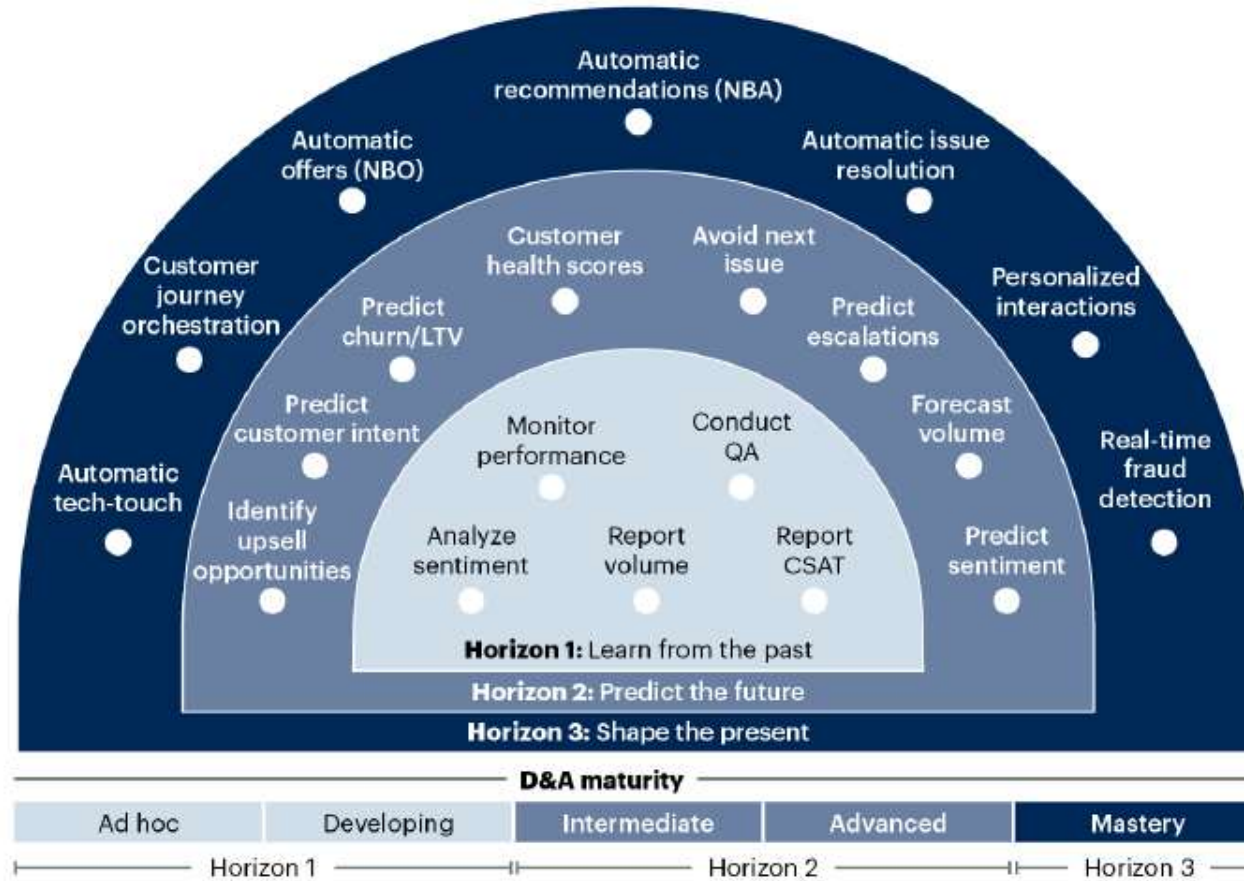


Examples of insights by maturity level



Gartner's Opportunity Horizon for Customer Service and Support Analytics

New use cases are unlocked as D&A maturity increases



Source: Gartner
800106_C

Gartner

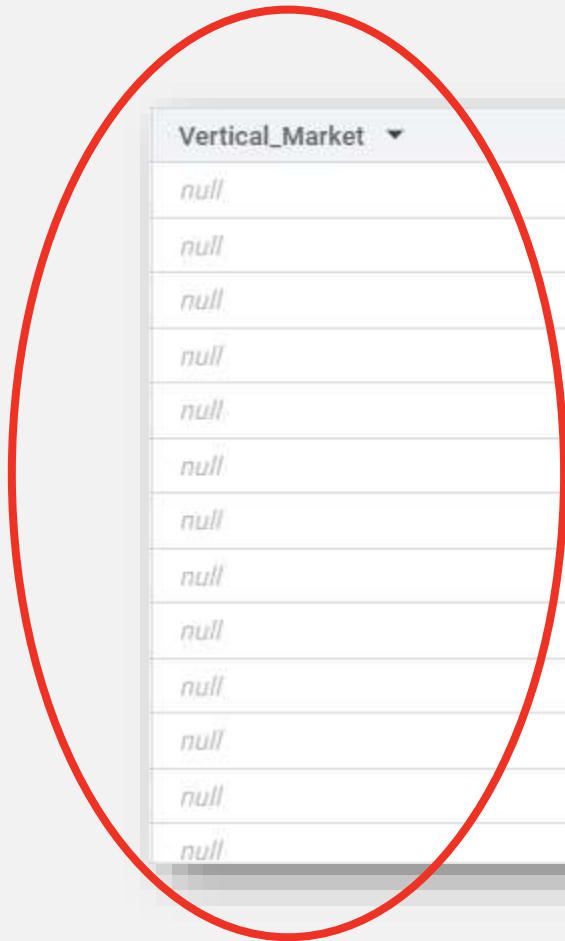
Can AI do this for me?



**Short Answer:
You still need good data**



**And you need to know what questions
you want to answer in advance**

How are we performing in a specific vertical market?



Vertical_Market ▾	Project_Name ▾	StageName ▾	CloseDate ▾
null	Chiller Condenser Head	Closed Won	2025-04-04
null	DEMAND MECHANICAL 25729...	Closed Won	2025-03-10
null	OCALLA RTU 13	Closed Won	2025-03-21
null	QuickBox Filters	Closed Won	2025-03-18
null	25762247 - Opportunity	Closed Won	2025-03-17
null	RunTru Coils	Closed Won	2025-03-13
null	25694566 - Opportunity	Closed Won	2025-03-12
null	Frank Villa	Closed Won	2025-03-31
null	Job Rooftop	Closed Won	2025-03-31
null	AAA Stock order stats lights	Closed Won	2025-03-12
null	25481289 - Heat Exchanger & ...	Closed Won	2025-03-26
null	25712371 - Opportunity	Closed Won	2025-03-17
null	25792578 - Opportunity	Closed Won	2025-03-26

What's bad about the data in this Opportunity?

Details		Marketing	Files	Related	Products	Cases
1	Opportunity Name	DMCPN				
	Alias Name					
	Stage	Proposal				
	Fulfillment Status	Open				
	Process Status					
	Opportunity Owner					
	Co-Opportunity Owner					
	Lead Estimator					
	Strategy	Not Strategic				
	Strategy Definitions	Strategy Definitions				
	NDA	<input type="checkbox"/>				
2	Account Name					
	Bid Date	12/4/2024				
	Bid Due Time					
	Close Date	4/7/2025				
	Description					
	Sales Region	Pacific Southwest				
	Sales Office	Las Vegas-W5				
	Worksight Database	Las Vegas-W5				
	Out of Territory Office					
	Project Bid Type	Replacement				
Amount Info						
	Amount	USD				
	Equipment	USD				
	Applied	USD 0.00				
	Unitary	USD				
	Ductless	USD 0.00				
	Non-Trane	USD				
	Controls	USD 0.00				
	Controls Product	USD 0.00				
	Turnkey	USD 0.00				
	Service	USD 0.00				
	Comprehensive Solutions	USD 0.00				
	Opportunity Currency	USD - U.S. Dollar				
	Exclude From Pipeline	<input type="checkbox"/>				
	Probability (%)	40%				
	Factored Amount	USD				
	Factored Controls	USD 0.00				
	Total Booking Confidence %	10%				
	Controls Confidence %					
	Estimated Margin %					
	Sync Amount from WorkSight	<input checked="" type="checkbox"/>				
	Amount Standard Work	Amount Standard Work				
Opportunity Details						
	Revenue Stream Type	Equipment				
	Basis of Design Equipment	No BoD				
	Other Equipment Competitor					
	Equipment DIF Rating					
3	Vertical Market	Other - New Vertical				
	Revenue Stream	Lt Unitary no Control				
	Basis of Design Controls	No Controls Specifications				
	Other Controls Competitor					
	Controls DIF Rating					
	Replacement Type					

5 things you can do to improve your data quality



1 Nominate a data steward

2 Start small & simplify

3 Standardize & document

4 Automate where possible

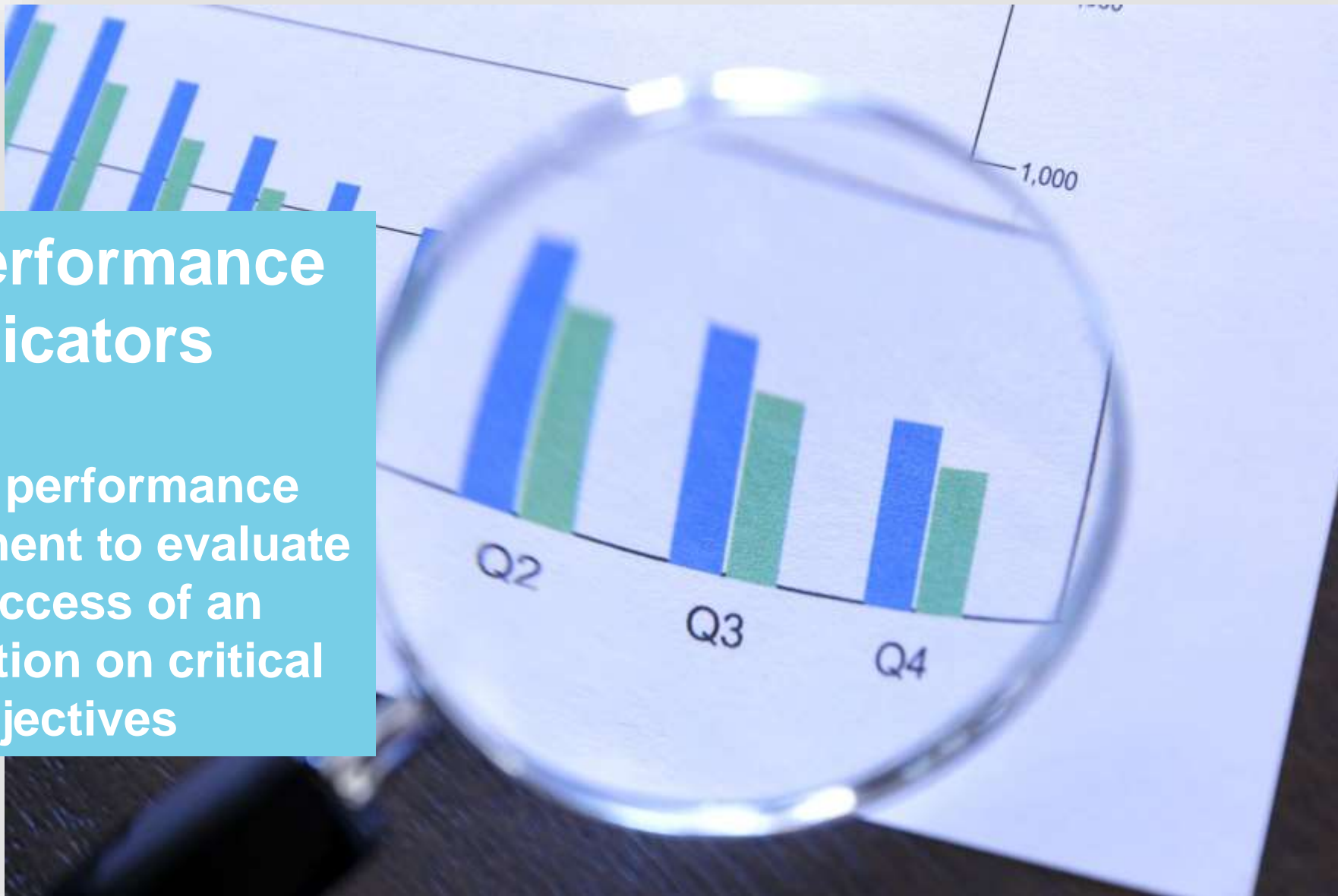
5 Reduce manual entry & free text



Determine your key performance indicators

Key Performance Indicators

Type of performance measurement to evaluate the success of an organization on critical objectives



Steps to effectively track KPI



1. Define

Clearly define your
key metrics



2. Collect

Create a plan to
collect the data



3. Monitor

Regularly track
performance



4. Analyze

Analyze results to
make decisions



1. Define your key performance indicators (KPI)



- What are your standard “run-the-business” metrics?
- What are your organizational goals?
- What are your major initiatives?
- What are your critical success factors for achieving those goals?
- Who do you need to get buy in and alignment?

Example: Increase services revenue by 10% in 2025.



How?

- Increase revenue on service maintenance agreements by 10% in 2025.
- Sell a service maintenance agreement on 50% of installed equipment in 2025.
- On time renewal of maintenance agreements 100% of the time.



2. Determine how you'll collect your data



Things to determine:

- **Where** the data will come from
- **Who** is responsible for collecting data
- **Where** the data will be recorded
- **How** often data will be pulled

METRICS	MOR?	OWNER	DETAILS	Target	MONTHLY METRICS					
					January	February	March	April	May	June
Sales En: Communications	No	Maria	MSU email Open Rate *	Target	40%	40%	40%			
				Actual	36%	33%				
Sales En: Communications	No	Maria	MSU Email Click Through*	Target	4%	4%	4%			
				Actual	4%	4%				
Sales En: Communications	No	Maria	Weekly news email open rate*	Target	40%	40%	40%			
				Actual	36%	34%				
Sales En: Communications	No	Maria	Weekly news email Click Through*	Target	3%	3%	3%			
				Actual	3.5	3%				
Sales En: Content Clean Up	No	Maria	Files Removed	Target	4671	1500	1500			
				Actual	1056	682				
Sales En: Content Clean Up	No	Maria	Files Reviewed/Doc type OR "keep/delete" identified	Target	1457	1000	1500			
				Actual	220	2024				
SF: Project Completion	Yes	Maria	Number of major priority releases in SF	Target	0	1	1			
				Actual	0	1	1			
SF: Win Plan creation	Yes	Maria	# of win plans created I SF	Target	210	225	250			
				Actual	230	273				
SF: Training Development	No	Maria	% of training developed (to be replaced by actual training metrics once launched)	Target	75%	90%	100%			
				Actual	75%	90%				
Installed Base: Assets Dispositioned	No	Chris	Number of assets linked to a location in the ALT (total, not monthly)	Target	7,000	10000	13000			
				Actual	7,252	8,813				



3. Monitor performance with a scorecard



4. Analyze performance to make decisions



Determine when you'll take corrective action based on performance against targets

Track actions to take and results

5 actions to take now for KPI



1 Define your KPI and targets

2 Create a data collection plan

3 Create a scorecard and owner

4 Schedule regular cadence to review

5 Track corrective actions





Drive results with CRM and salesforce automation

Why do you need a CRM / SFA system?



- Enable customer intimacy
- Pipeline & forecast metrics
- Sales productivity & effectiveness
- Lead management
- Better campaigns
- Single view of customer
- Reporting



It still all starts with data



“Customizing the sales analytics dashboards to deliver the exact business intelligence the sales teams need **starts with deciding early** the timing, strategy, and organization of **data inputs**.”

Gartner (2023)



Details	Marketing	Files	Related	Products	Cases
1 Opportunity Name	Verzion Branchburg TE003202				
Alias Name					
Stage	Closed Lost				
Fulfillment Status	Closed - Lost				
Process Status	Complete				
Opportunity Owner					
Co-Opportunity Owner					
Lead Estimator					
Strategy 1	Strategy 3				
Strategy Definitions	Strategy Definitions				
NDA 1	<input type="checkbox"/>				

2 Account Name 1	Dj Wagner Hvac
Bid Date	11/7/2022
Bid Due Time	
Close Date 1	11/7/2022
Description	Job Conversion TE003202
Sales Region 1	Mid-Atlantic
Sales Office 1	Philadelphia-D2
Worksight Database 1	Philadelphia-D2
Out of Territory Office	
Project Bid Type	

Details	Marketing	Files	Related	Products	Cases
Opportunity Name	Come shop with me i got IPAKs for the low				
Alias Name					
Stage	Closed Lost				
Fulfillment Status	Closed - Lost				
Process Status	Complete				
Opportunity Owner					
Co-Opportunity Owner					
Lead Estimator					
Strategy 1	Not Strategic				
Strategy Definitions	Strategy Definitions				
NDA 1	<input type="checkbox"/>				


Account Name 1	
Bid Date	
Bid Due Time	
Close Date 1	3/24/2025
Description	
Sales Region 1	Southern Atlantic
Sales Office 1	Roanoke-E4
Worksight Database 1	Roanoke-E4
Out of Territory Office	
Project Bid Type	







All key fields filled out

- ✓ Job name is descriptive
- ✓ Account Name correct
- ✓ Vertical Market filled out & accurate

 Opportunity
EdgeCore Mesa 3 - Chillers

Stage
Closed Won

Opportunity Owner


Amount
USD 

Controls
USD 0.00

Bid Date
7/20/2023

CRM ID
7568697

>










✓

✓

✓









Details

MarketingFilesRelatedProductsCases

Opportunity Name	EdgeCore Mesa 3 - Chillers	Account Name	  Digital Infrastructure
Alias Name		Bid Date	7/20/2023
Stage	Closed Won	Bid Due Time	
Fulfillment Status	Closed - Ordered	Close Date	 8/1/2024
Process Status	Complete	Description	
Opportunity Owner		Sales Region	 Southeast
Co-Opportunity Owner		Sales Office	 Atlanta-G1
Lead Estimator		Worksight Database	 Atlanta-G1
Strategy	 Strategy 3		
Strategy Definitions	Strategy Definitions		
NDA	 <input type="checkbox"/>		



Opportunity Details

Revenue Stream Type	 Equipment	Revenue Stream	Applied no Control
Basis of Design Equipment	 BoD on Majority - Trane	Basis of Design Controls	 No Controls Specifications
Other Equipment Competitor		Other Controls Competitor	
Equipment DIF Rating		Controls DIF Rating	
Vertical Market	 Data Centers - Colocation	Replacement Type	
Close Reason		SOR	 No
COOP Quote Number		Critical to Close	 <input type="checkbox"/>
COOP & Federal Contract ID		Primary Campaign Source	
		Local Initiative	

Systems from Trane

Systems from Trane	Air Cooled Chilled Water System
System Definitions	Salesforce

More accurate fields = more insights



Opportunity NameProject Silver Eagle MKE3

Alias Name

StageClosed

Fulfillment StatusClosed

Process StatusComplete

Opportunity Owner

Co-Opportunity Owner

Lead Estimator

StrategyNot Strategic

Strategy DefinitionsStrategy Definitions

NDA

Account NameFulfillment Services Inc

Bid Date6/21/2024

Bid Due Time

Close Date10/31/2024

Description(4) HP Hybrid RTU, (18) RTU HP, (9) RTU cooling only, (27) SS HP, (2) CRAC's, (76) HVAC VRF, (33) DSS HP

Sales RegionNational Accounts

Sales OfficePacific Northwest Rocky Mountain National Accounts-ZK

Worksight DatabasePacific Northwest Rocky Mountain National Accounts-ZK

Out of Territory Office

Project Bid TypeRe-Bid

Amount Info

Amount

Equipment

Applied

Unitary

Ductless

Non-Trane

Controls

Controls Product

Opportunity CurrencyUSD - U.S. Dollar

Exclude From Pipeline

Probability (%)0%

Factored AmountUSD 0.00

Factored Controls

Total Booking Confidence %

Controls Confidence %5%

Estimated Margin %

Account NameState Mechanical Services

Credit Hold

Legal Hold

Opportunity Win Plans (0)

Notes (1)

attributional bidders

8/31/2023 12:13 PM by Jessica Jackson

State Mechanical is also bidding this. 1901 is no longer bidding this project. Trane Bids MADison...

View All

Contact Roles

Opportunity Influencers

Locations

Opportunity Influencers (5+)

5+ items • Sorted by Account Name • Updated a few seconds ago

	Account Name	Opportuni...	Account Owner	Sales Office	Bidder
1	1901 Inc	Contractor		Madison-T1	
2	August Winter & Sons Inc	Contractor		Appleton-T6	
3	Clayco Construction Co...	Contractor		St. Louis-Q3	
4	J F Ahern Company	Contractor		Milwaukee-T5	
5	Jordan & Skala Eng Inc	Engineer		Atlanta-G1	

View All

Standard sales metrics to track



Sales Velocity = (opportunity volume) * (average deal size) * (success rate) / (average cycle time)

Opportunity Volume / Pipeline Creation

Number of deals with a close data in 1Q, measured at the beginning of 1Q

Average Deal Size

Average value of deals won in 1Q

Success Rate / Win Rate

Ratio of won deals in 1Q to initial pipeline

Average Cycle Time

Average time from opportunity creation or conversion to deal close among deals won in 1Q

Compare sellers on these 4 metrics to identify top performers

Sources:

Rietberg, S. (2024, September 20). Quick Answer: What Metric Should Be Featured in All Executive Sales Dashboards? Gartner ID G00742448

Rietberg, S. (2024, April 2). Determine What Really Drives Productivity with Comparative Seller Performance Metrics. Gartner ID G00778469

Use seller performance on metrics to improve



If top performers excel in this metric...

Opportunity Volume / Pipeline Creation



Consider investing in these for the rest of the team

- Third party prospecting data
- Lead routing technology
- Training on early stage qualification activities
- Opportunity qualification methodology redesign
- Channel program redesign & partner recruitment

Average Deal Size



- Cross-sell / upset training and collateral
- Pricing exception policy, process and tools
- Territory planning

Success Rate / Win Rate



- Sales methodology training and tools
- Account planning process and tools
- Proposal creation, negotiation, and objection handling
- Virtual selling tools
- Digital sales rooms

Average Cycle Time



- Seller productivity tools
- Digital sales rooms
- Evaluate sales stage metrics

5 steps for better CRM data & insights



1

Nominate a steward

2

Standardize as much as possible

3

Clean and maintain

4

Reduce free text fields


5

Set clear expectations





Dig into your installed base

A wide-angle photograph of the New York City skyline, showing numerous skyscrapers and buildings under a clear blue sky. The image is used as a background for the text overlay.

**“Assess the maturity of your
installed base** selling process,
people, data, and tools...
Regardless of maturity level, **invest
in a solid data foundation.”**
Forbes (2023)

Sell more to your existing customers



Types of Data

- Customer account & contact information
- Type of asset
- Asset location
- Age of asset
- Service history / last service date
- Service contract information / status
- Service contract effective dates / expiration
- Number of assets at a site
- ...



Example: Asset Linking Tool



Asset Linking Tool

Assign Assets To A Location

Help & Instructions

39 Assets

Reset

Group By

Asset

Assets to Show

My Sales Office

Service Agreement Eligibility Filter

Linkage

All Assets

Search

type here..

Recommended Address Type

All

With Existing Location

New Location

Product Family

Filter by Product Family(s)

Confidence

All

Shipping Date Filter

All

Asset

Asset Name: 20-130 Ton Air-C

Sales Order Number:

Shipping Date: 03/04/2025

Serial Number:

Credit Project #:

Model Number: CGAM080F2AA2EXJ2A...

Credit Project Name: SBC ATT Oakfield Chiller Replacement

Sales Region: Great Lakes

Product Family: 20-130 Ton Air-Cooled

Sales Office: Detroit-M1

Sold By:

Confidence

8

More Info

Recommended Location

Address: #1 +1

Google

Keyboard shortcuts | Map data ©2025 | Terms

Take Action

Accept

Reject

Manually Assign

Asset

Asset Name: 20-130 Ton Air-C

Sales Order Number:

Shipping Date: 03/04/2025

Serial Number:

Credit Project #:

Model Number: CGAM080F2AA2EXJ2A...

Credit Project Name: SBC ATT Oakfield Chiller Replacement

Sales Region: Great Lakes

Product Family: 20-130 Ton Air-Cooled

Sales Office: Detroit-M1

Sold By:

Confidence

8

More Info

Recommended Location

Address: #1 +1

Google

Keyboard shortcuts | Map data ©2025 | Terms

Take Action

Accept

Reject

Manually Assign

Sales opportunities from installed base data



Potential Triggers

- Assets on a site not under an agreement
- Upcoming service agreement expiration
- Upsell to higher tier service agreement
- Assets installed but not on agreement
- Break fix service completed
- Time for preventative maintenance
- Warranty expirations
- Open quote follow up
- Recent start up
- Aged asset
- ...



How to Action

- Generate reports and send via email
- Manually filter in a spreadsheet
- Marketing campaigns
- Outbound calling campaigns
- Create tasks in CRM/SFA
- Use machine learning for complex models
- ...



Example: Prospector



CHVAC Prospect App Page

Help With Prospector

Prospector Feedback

1.SELECT SCENARIO

2.SELECT FILTER

3.ANALYZE & CONVERT PROSPECT

Welcome to Prospector!

Select a scenario to start. Scenarios are pre-defined searches aligned to business objectives. You'll be able to further refine your search with additional filters in the **next** step.

View Saved/Shared Searches

Select a Scenario

9 of 9 items • 0 items selected

Scenario Name	Description	Business Objective
<input type="radio"/> Equipment Upgrade	Displays equipment with a scenario specific filter to sort by equipment age.	Identify equipment upgrade or replacement opportunities within a user defined geographical area with an option to sort by equipment age.
<input type="radio"/> Warranty Expiration	Displays equipment with an active labor warranty.	Identify equipment covered by an active labor warranty within a user defined geographical area for the purpose of trying to sell a service agreement at the end of the warranty period.
<input type="radio"/> Service Agreement	Displays equipment without an existing service contract or agreement.	Identify potential customers with equipment or locations in a user defined geographical area that do not have an existing service agreement.
<input type="radio"/> Sustainability: Refrigerant	Displays equipment with a scenario specific filter to sort by refrigerant type.	Identify equipment by product code for upgrade or replacement opportunities in a user defined geographical area with an option to sort by refrigerant type.
<input type="radio"/> Assets on Unassigned Accounts	Displays assets that do not currently have an assigned Account Manager and/or a Service Account Manager.	Identify accounts and locations where we have established relationships, but which are currently not maintained for one reason or another. This scenario is tailored specifically for new account managers that are looking to grow their book of business.



CHVAC Prospector

Scenario: Equipment Upgrade



67,294 Accounts | 191,849 Locations | 2,887,677 Assets

You have not limited the results enough, please apply more filters before moving forward



Reset Filters

Global Filters

Select geographic location

Trane Sales Region

(All)

Trane Sales Area

(All)

Trane Sales Office

(All)

State (or) Province

(All)

County

(All)

Postal

(All)

Market / Product Filters

Select Vertical Market & Product

Vertical Market

(All)

Product Family

(All)

Product Code + Desc.

(All)

Scenario Filters

These filters are to refine the results of the scenario

Service Contract Status

(All)

Service Account Manager

(All)

Account Name

(All)

Account Owner

(All)

Equipment Age (years)

0

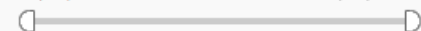
62



Start-up Date

10/30/1963

3/20/2025



5 steps to uncover sales opportunities in your installed base



1 Determine what data you have

2 Clean up and enrich data

3 Identify triggers that align to KPI

4 Identify targets for triggers

5 Develop action plan for targets









Recap

Today, we explored how to better use data to drive revenue growth



Develop Data	Determine KPI	Drive Results with CRM &SFA	Dig Into Installed Base
Slides 9 - 17	Slides 19 - 26	Slides 28 - 35	Slides 37 - 43
			

Data is life



It's also revenue



Breakout Workshops

Thank you!

If you would like to receive PDH credit for this session, please be sure to provide your feedback in the applicable session survey.
(Also available via the event App!)

**Surveys close 6/4/25*





Bonus: Don't forget your leads

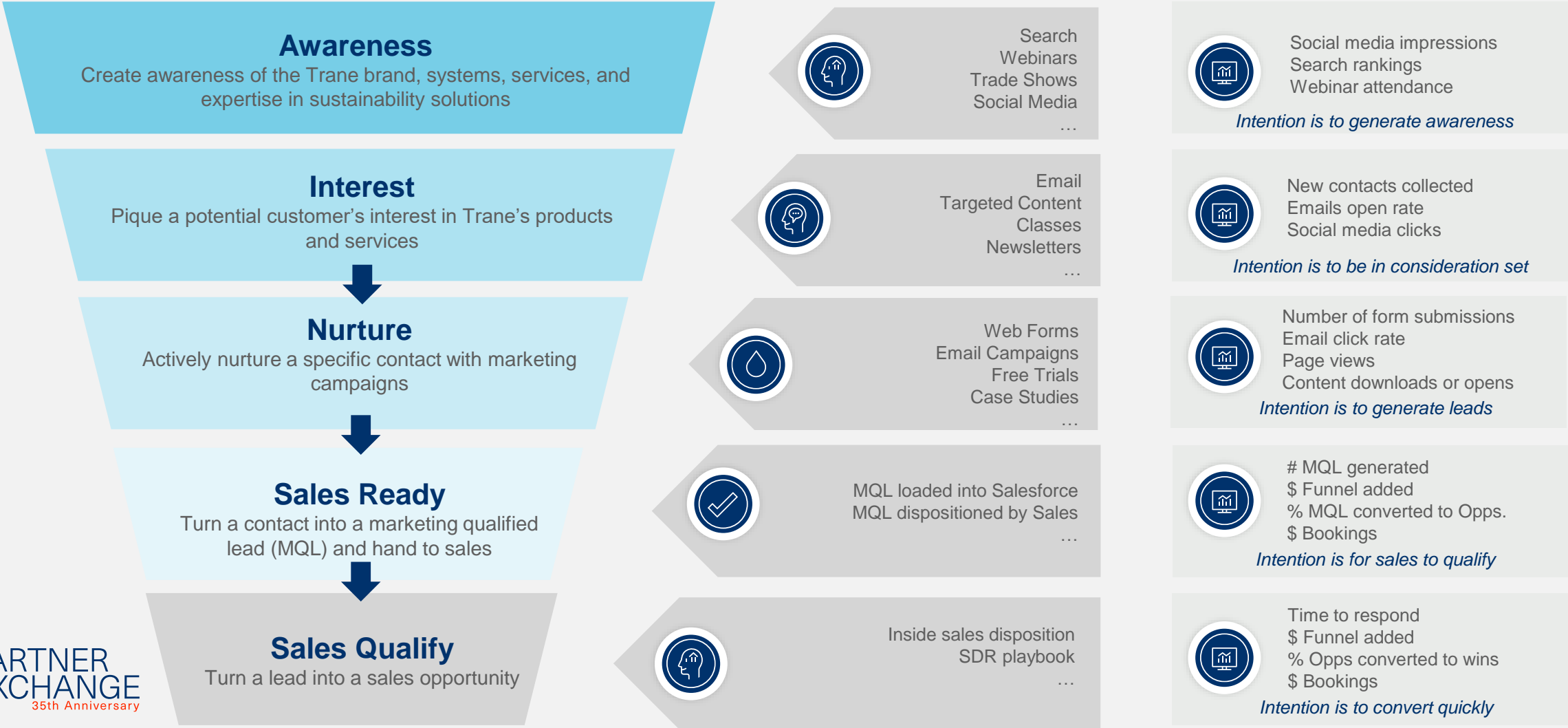
Sample metrics for lead gen and management



Marketing Stages

Example Tactics

Example KPI





2025 PARTNER EXCHANGE

35th Anniversary

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TOGETHER WE RISE

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