

INDUSTRY | AUTOMOTIVE



TNTX is one of the largest Freightliner and Western Star Automotive dealers in the United States. It encompasses two merged companies: TAG Truck Center and Lonestar Truck Group.

### Challenge

TNTX wanted a centralized hub for customer data that employees could access from anywhere. It also needed a way to capture institutional knowledge from retiring employees.

- Sales reps recorded customer data in on paper, in personal files, and locally on individual work devices
- This siloization made sharing, collecting, reporting, and obtaining real-time visibility into sales operations & performance difficult
- Traveling sales reps had no way to log into TNTX's systems while off-site, which resulted in reporting delays and out-of-date customer records
- Outgoing/retiring team members had no way to record or preserve institutional knowledge; this led to significant "brain drain" whenever turnover occurred

### Solution

Our team implemented Sales Cloud (Lightning version) and stood up Salesforce Mobile. We also configured TNTX's existing Tableau solution so the company could embed Tableau dashboards within Salesforce.

- Implemented a Sales Cloud Lightning solution focusing on leads, accounts, and contacts
- Stood up Salesforce Mobile with standard activity features
- Installed a managed Tableau package to embed Dashboards within TNTX's Account Record page
- Provided 3 weeks of support using the unused budget funds
- Delivered user training

### PRODUCTS USED



### Outcome

As a result of this engagement:

- Employees can access and update customer information from anywhere
- Sales leaders can review + make decisions based on real-time team performance
- TNTX can preserve institutional knowledge

