TNTX

Industry - Automotive

Products Used - Sales Cloud
Tableau
Lightning

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.

Products Used

📈 Sales Cloud

❄ Tableau

⚡ Lightning

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- Traveling sales reps had no way to log into TNTX's systems while off-site, which resulted in reporting delays and out-of-date customer records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

Value Delivered

Gerent 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

Results ✔

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