

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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“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...

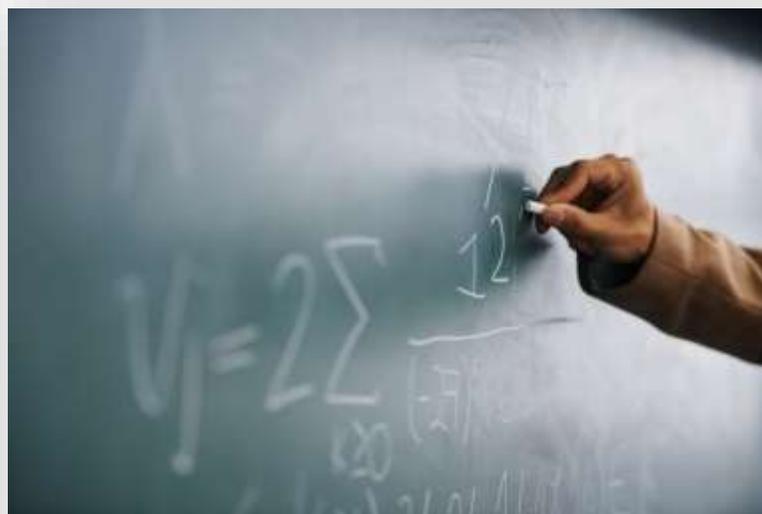
...Ironically, the net result of this flood of information is a **drought of insight.**”

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

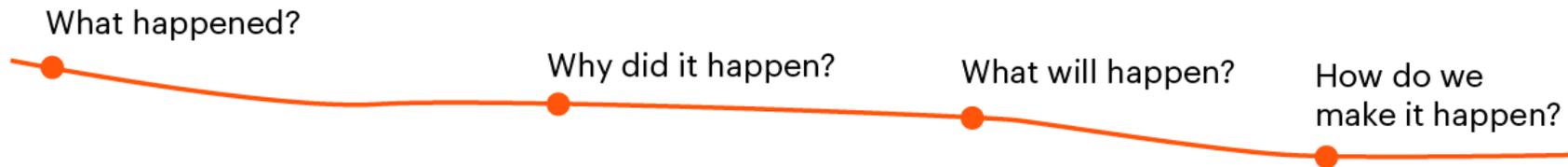


Milestones Along the Analytics Maturity Journey

Illustrative

— Time from analysis to insight

Level 1 Ad hoc	Level 2 Developing	Level 3 Intermediate	Level 4 Advanced	Level 5 Mastery
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Source: Gartner
800106_C





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

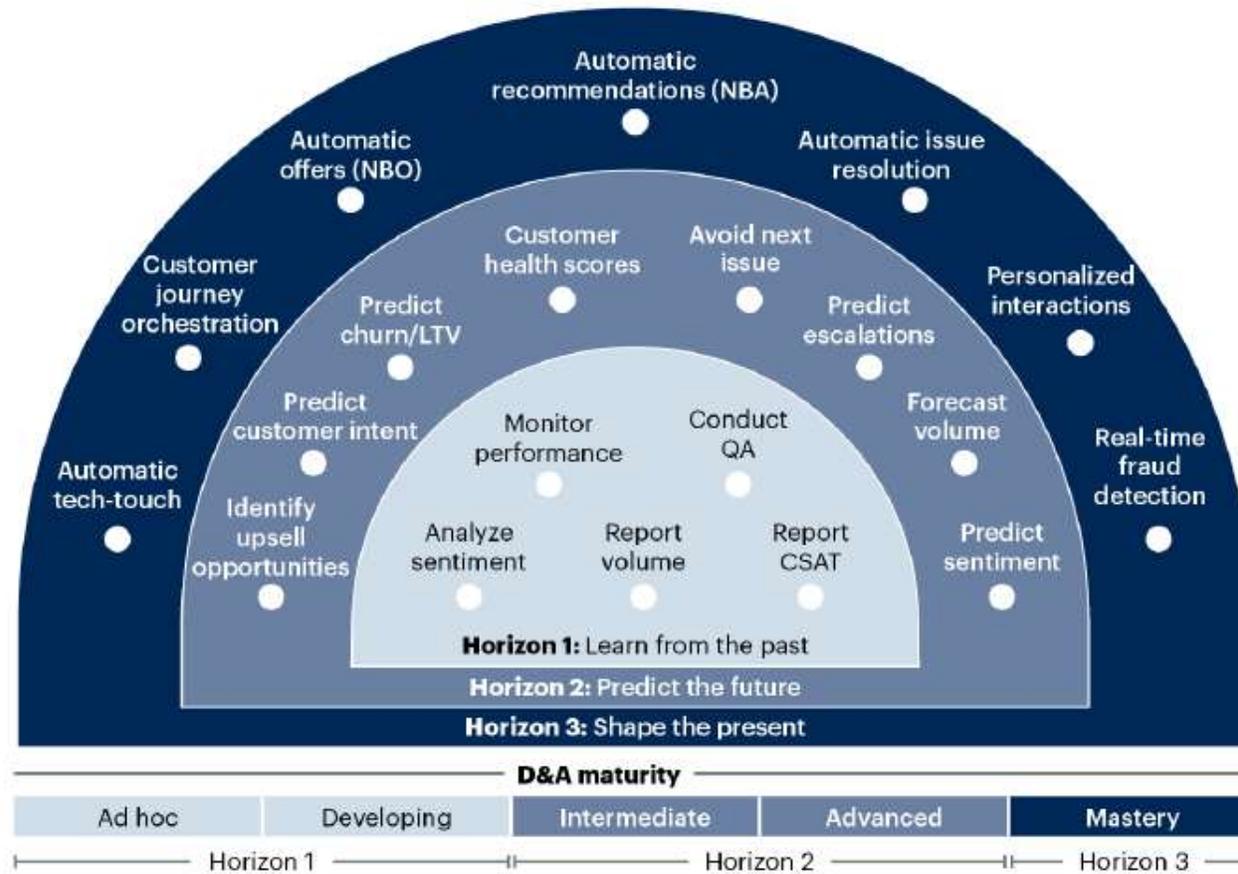


Examples of insights by maturity level



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

Sources:

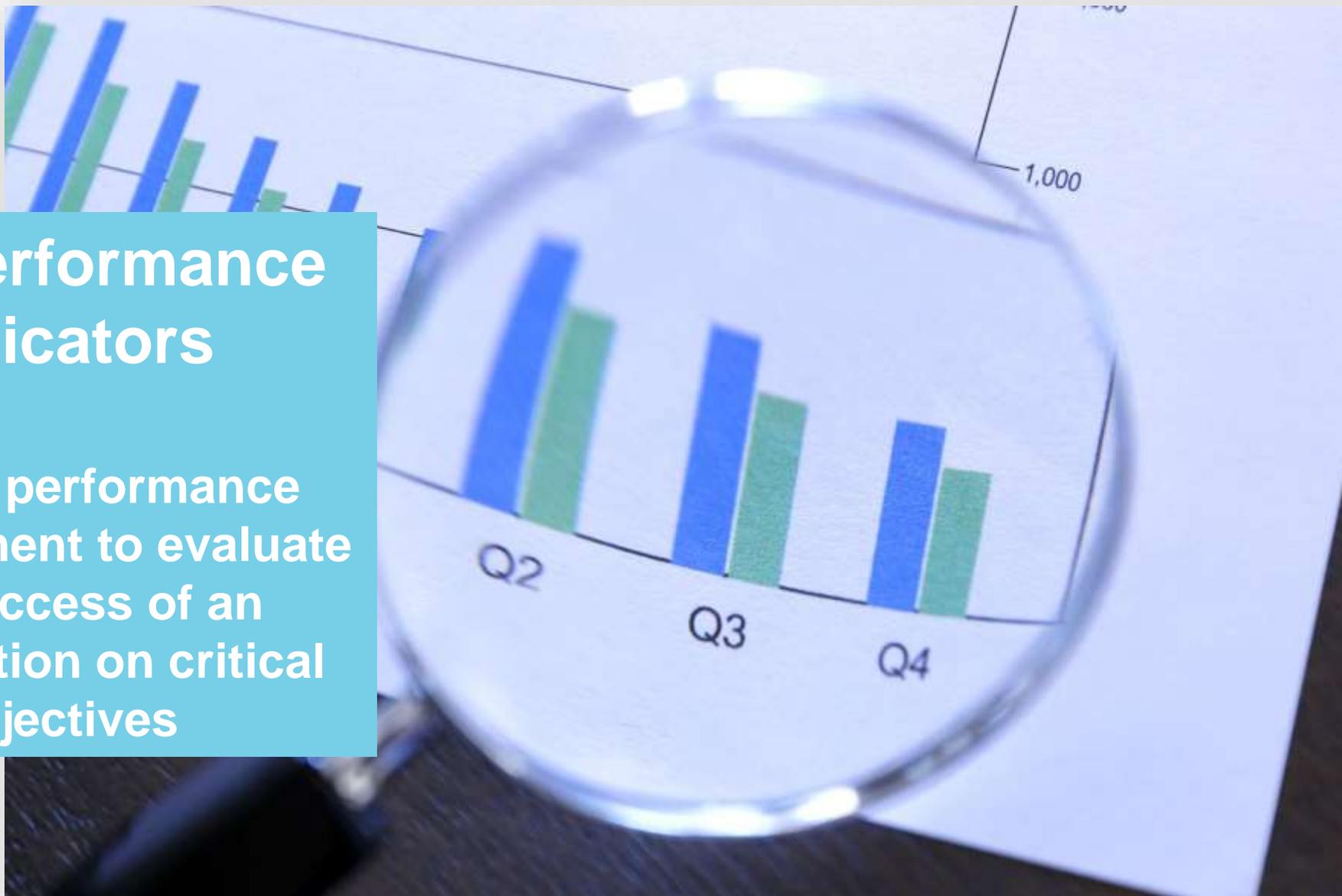
Torres, A. (2023, February 6). Use Gartner's Sales Analytics Framework to Deliver Insights that Improve Sales Results. Gartner ID G00781455
Bedi, A. K. (2024, January 11). Maximize Sales Analytics with Data Governance, Quality, and Collaboration. Gartner ID G00803843



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	Strategy 3				
	Strategy Definitions	Strategy Definitions				
	NDA	<input type="checkbox"/>				

2	Account Name	Dj Wagner Hvac				
	Bid Date	11/7/2022				
	Bid Due Time					
	Close Date	11/7/2022				
	Description	Job Conversion TE003202				
	Sales Region	Mid-Atlantic				
	Sales Office	Philadelphia-D2				
	Worksight Database	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	Not Strategic				
	Strategy Definitions	Strategy Definitions				
	NDA	<input type="checkbox"/>				

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





Opportunity
EdgeCore Mesa 3 - Chillers

Stage: Closed Won | Opportunity Owner: [Redacted] | Amount: USD [Redacted] | Controls: USD 0.00 | Bid Date: 7/20/2023 | CRM ID: 7568697

Navigation: > [Dropdown] [Dropdown] [Dropdown]

Details | Marketing | Files | Related | Products | Cases

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	[Redacted]	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"/>		



All key fields filled out

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

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 Name: Project Silver Eagle MKE3 ✓

Account Name: Fulfillment Services Inc ✓

Alias Name: [Redacted]

Stage: Closed ✓

Fulfillment Status: Closed ✓

Process Status: Complete

Opportunity Owner: [Redacted]

Co-Opportunity Owner: [Redacted]

Lead Estimator: [Redacted]

Strategy: Not Strategic

Strategy Definitions: Strategy Definitions

NDA:

Amount Info

Amount	[Redacted]	Opportunity Currency	USD - U.S. Dollar
Equipment	[Redacted]	Exclude From Pipeline	<input type="checkbox"/>
Applied	[Redacted]	Probability (%)	0%
Unitary	[Redacted]	Factored Amount	USD 0.00
Ductless	[Redacted]	Factored Controls	[Redacted]
Non-Trane	[Redacted]	Total Booking Confidence %	[Redacted]
Controls	[Redacted]	Controls Confidence %	5%
Controls Product	[Redacted]	Estimated Margin %	[Redacted]

Bid Date: 6/21/2024 ✓

Bid Due Time: [Redacted]

Close Date: 10/31/2024

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 Region: National Accounts

Sales Office: Pacific Northwest Rocky Mountain National Accounts-ZK

Workstight Database: Pacific Northwest Rocky Mountain National Accounts-ZK

Out of Territory Office: [Redacted]

Project Bid Type: Re-Bid ✓

Account Name: State Mechanical Services ✓

Credit Hold:

Legal Hold:

Opportunity Win Plans (0) [New]

Notes (1) ✓ [New]

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+) ✓ [New]

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

	Account Name ↑	Opportuni...	Account Owner	Sales Office	Bidder
1	<input type="checkbox"/> 1901 Inc	Contractor	[Redacted]	Madison-T1	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> August Winter & Sons Inc	Contractor	[Redacted]	Appleton-T6	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> Clayco Construction Co...	Contractor	[Redacted]	St. Louis-Q3	<input checked="" type="checkbox"/>
4	<input type="checkbox"/> J F Ahern Company	Contractor	[Redacted]	Milwaukee-T5	<input checked="" type="checkbox"/>
5	<input type="checkbox"/> Jordan & Skala Eng Inc	Engineer	[Redacted]	Atlanta-G1	<input type="checkbox"/>

[View All](#)

Standard sales metrics to track



$$\text{Sales Velocity} = (\text{opportunity volume}) * (\text{average deal size}) * (\text{success rate}) / (\text{average cycle time})$$

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



Average Deal Size



Success Rate / Win Rate



Average Cycle Time



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

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

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

- 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 high-angle photograph of a dense city skyline, likely New York City, featuring numerous skyscrapers and older buildings under a clear blue sky.

“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: [Redacted]	Shipping Date: 03/04/2025
Serial Number: [Redacted]	Credit Project #: [Redacted]	
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: [Redacted]	

Confidence

8

>>

Recommended Location

Address: #1 +1

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



TRANE

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

Slider range from 0 to 62

Start-up Date

10/30/1963 3/20/2025

Slider range from 10/30/1963 to 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



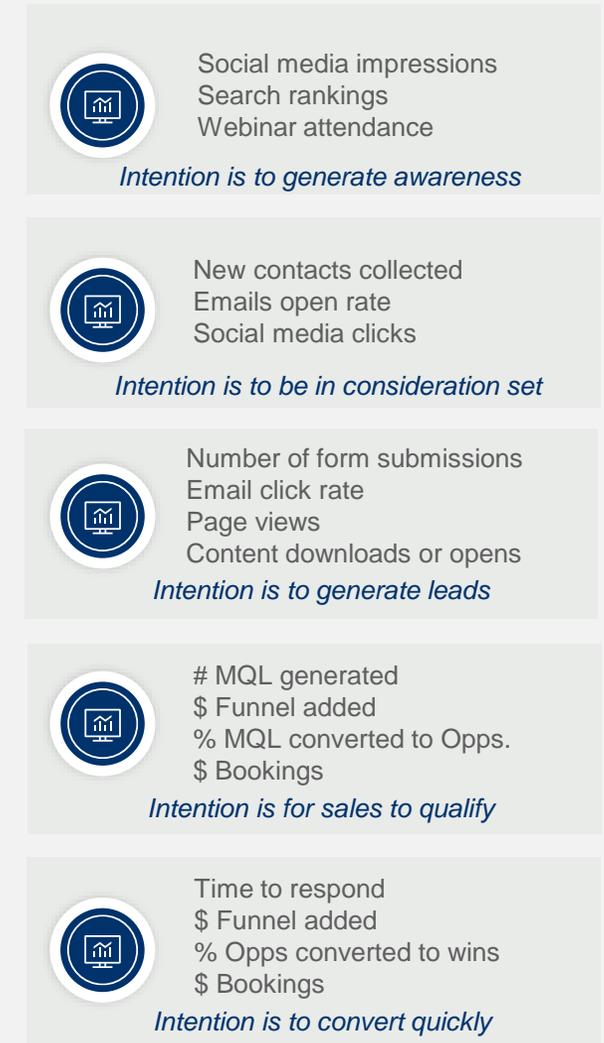
Marketing Stages



Example Tactics



Example KPI





2025 PARTNER EXCHANGE

35th Anniversary

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