

2017 SUGM User's Meeting Sales Manager



Sales Management:



Sales Management:

- What are some of the biggest problems that your Sales Department faces?



Sales Management:

- What are some of the biggest problems that your Sales Department faces?
 - Ageing Sales Force



Sales Management:

- What are some of the biggest problems that your Sales Department faces?
 - Ageing Sales Force
 - Complacency on the part of your Sales Reps



Sales Management:

- What are some of the biggest problems that your Sales Department faces?
 - Ageing Sales Force
 - Complacency on the part of your Sales Reps
 - No meaningful direction from Management



Technology to the rescue?



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- No doubt technology can help increase sales.



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 - Automation level of the sales force



Technology to the rescue?

- No doubt technology can help increase sales.
- If you haven't done much with STEP1's strategic sales tools yet, this class will be your blueprint for how to start.
- Two subjects we will discuss:
 - Automation level of the sales force
 - Strategic tools that are either the easiest or most influential for you to start with



Mobile Hardware available for Reps:



Mobile Hardware available for Reps:

- Tablets (iPad, Android, etc)
- Microsoft Surface
- Smart Phones



Mobile STEP1 Tools available for Reps:



Mobile STEP1 Tools available for Reps:

- Web Sales Rep
- Pricebook
- CRM
- JM ERA



So how far should you go to
automate your reps??



So how far should you go to automate your reps??

- No automation



So how far should you go to automate your reps??

- No automation
- Some automation (some reps equipped, some not)



So how far should you go to automate your reps??

- No automation
- Some automation
- Full automation (everyone with a mobile device connected to STEP1) (mix of Web Sales Rep and Pricebook is good)



So how far should you go to automate your reps??

- No automation
- Some automation
- Full automation
- REALLY Full automation!!
 - (mobile plus CRM)



So how far should you go to automate your reps??

- No automation
- Some automation
- Full automation
- REALLY Full automation
- REALLY REALLY Full automation!!
 - (mobile plus CRM plus ERA)



What's the minimum?



What's the minimum?

- No automation
- Some automation
- Full automation
- REALLY Full automation
- REALLY REALLY Full automation



What's the level they should be at?

- No automation
- Some automation
- Full automation
- REALLY Full automation
 - Everyone automated, Web Sales Rep & CRM
- REALLY REALLY Full automation



Big Picture Goal of Utilizing Technology



Big Picture Goal of Utilizing Technology

- We need to use technology to:



Big Picture Goal of Utilizing Technology

- We need to use technology to:
 - Increase our sales (within existing and by opening new accounts)
 - Increase our margins
 - Increase our Average Gross Profit/Order
 - Increase our Managerial Control over the process



Big Picture Goal of Utilizing Technology

- We need to use technology to:
 - Increase our sales (within existing and by opening new accounts)
 - Increase our margins
 - Increase our Average Gross Profit/Order
 - Increase our Managerial Control over the process
- So where should you focus first?



Focus Points:

- Average GP/Order *by customer*



Focus Points:

- *Average GP/Order by customer*
- This is a vote for 'REALLY Full Automation'
 - Check out this CRM screen:



Focus Points:

CRM | Bob

crm.glenmartinlimited.com/Customers.aspx?CustID=11662

Apps | Google Maps | Property Resources | J Block stuff | Family stuff | Glass Diamond Award | Enterprise Rent-A-Car | Barcode for STEP1 | Draper Diplomat/R, 1 | Other bookmarks

SCOTT | THE COUNTRY CLUB (CL-CC100) C | Administration

Search Customers

THE COUNTRY CLUB
20 LLOYD ST
WOODBIDGE, ON

THE COUNTRY CLUB - KITCHEN
20 LLOYD ST
WOODBIDGE, ON

THE GEORGIAN MANOR RESORT &
10 VACATION INN DRIVE
COLLINGWOOD, ON

THE GEORGIAN RETIREMENT HOMI
255 GOVERNOR'S ROAD
DUNDAS, ON

THE GROUND CREW
229 SPENCER AVE
THORNTON, ON

THE HURLEY GROUP
5560 EXPLORER DR
MISSISSAUGA, ON

THE ORIGINAL FLAG STORE
176 SAUNDERS RD
BARRIE, ON

THE ORIGINAL MONDOS
RESTAURANT & DELI LTD.
BARRIE, ON

Market Group: RECREATIONAL | Class:

Customer Score Card

	Year To Date		Last 3 Months		Last Month	
	CY	PY	CY	PY	CY	PY
Sales	5,228	2,782 ↑	5,228	2,618 ↑	4,858	2,422 ↑
GP	1,117	647 ↑	1,117	623 ↑	1,036	628 ↑
Avg GP/Order	62	43 ↑	62	44 ↑	74	57 ↑
GP %	21.4	23.3 🟡	21.4%	11.9% ↑	21.3%	25.9% ↓

Category ScoreCard

Category	% of Sales Customer	% of Sales Group	LastSaleDate	12mth Sales	12mth Profit
CHEMICALS	25.4	29.52	5/12/2016	↓	↓
HAIR & BEAUTY	23.5	10.81	5/12/2016	↑	↑
PAPER	22.9	28.56	5/12/2016	🟡	↓
MAINTENANCE PRODUCTS	11.2	10.14	5/12/2016	↓	↓
GARBAGE BAGS	9.9	9.16	5/5/2016	↑	↑
FOOD SERVICE	2.5	2.19	4/28/2016	↑	↑
PARTS	2.2	2.37	5/5/2016	↑	↑
EQUIPMENT	1.0	2.75	7/30/2015	↑	↑

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Customers | Prospects | Contacts | Opportunity | Activities | Notes | Calendar

Search the web and Windows | 2:00 PM 5/16/2016



Focus Points:

- *Average GP/Order by customer*
- So this customer has Ave GP/Order of \$62...
- *Now let's check out our net profit on this customer... (switch to spreadsheet)*



Focus Points:

- *Average GP/Order by customer*
- Market Group:



Focus Points:

- Average GP/Order *by customer*
- Market Group:
 - The more we sound like experts, the more they buy



Focus Points:

- Average GP/Order *by customer*
- Market Group:
 - The more we sound like experts, the more they buy
 - The easier it is to prospect for new similar accounts



Focus Points:

- Average GP/Order *by customer*
- Market Group:
 - The more we sound like experts, the more they buy
 - The easier it is to prospect for new similar accounts
 - The more effective our Email Marketing campaigns will be



STEP1 Strategic Elements to start with



STEP1 Strategic Elements to start with

- Sales Manager – set Goals



STEP1 Strategic Elements to start with

- Sales Manager – set Goals
- Precision Marketing – 88 Graphics



STEP1 Strategic Elements to start with

- Sales Manager – set Goals
- Precision Marketing – 88 Graphics
- Dispenser Manager



STEP1 Strategic Elements to start with

- Sales Manager – set Goals
- Precision Marketing – 88 Graphics
- Dispenser Manager
- Supply Usage Manager



Sales Manager Goals



Sales Manager Goals

- Very easy to set up



Sales Manager Goals

- Very easy to set up
- Good visibility for both reps and manager



Sales Manager Goals

- Very easy to set up
- Good visibility for both reps and manager
 - Web Sales Rep
 - Order Desk



Sales Manager Goals

Sales Manager * V737Demo Supply Co.

File Search Reports SavedQueries Help

Summary Sales Offices **Salesmen** Leads Review Orders Key Customers All Customers Products Dispenser Sales Orders Que

SmanCode	Salesman Name	SalesOffice	MTD Profit	PYr MTD Profit	QTD Profit	PYr QTD Profit	YTD Profit	PYTD Profit	#
BOBT	Bob Tomlinson	STEP1	\$2,760.07	\$4,436.84	\$5,290.63	\$6,662.11	\$5,290.63	\$6,662.11	
BSTANLEY	Bob Stanley	STEP1	\$4,720.97	\$2,330.27	\$10,138.24	\$5,542.03	\$10,138.24	\$5,542.03	
GBRONSO	Graham Bronson	STEP1	\$306.08	\$10,983.14	\$306.08	\$15,174.19	\$306.08	\$15,174.19	
GJONAS	Godfrey Jonas	STEP1	\$25,304.35	\$5,702.98	\$50,999.06	\$8,264.31	\$50,999.06	\$8,264.31	
GSTANTON	Gary Stanton	STEP1	\$3,275.74	\$418.49	\$5,196.69	\$4,241.68	\$5,196.69	\$4,241.68	
HOUSE	Robert McDowell	STEP1	\$692.14	\$55,063.54	\$1,439.66	\$110,783.14	\$1,439.66	\$110,783.14	
JALTAIRS	Jason Altairs	STEP1	\$635.66	\$5,189.49	\$635.66	\$9,999.73	\$635.66	\$9,999.73	
JMAKI	Jason Maki	STEP1	\$2,645.79	\$4,489.50	\$6,708.75	\$8,119.20	\$6,708.75	\$8,119.20	
JSAMUELS	Jerry Samuels	STEP1	\$1,880.15	\$88.62	\$6,243.26	\$88.62	\$6,243.26	\$88.62	
MHUGHES	Mike Hughes	STEP1	\$20,109.41	\$861.62	\$45,341.89	\$861.62	\$45,341.89	\$861.62	
PLEWIS	Paul Lewis	STEP1	\$19,050.74	\$2,925.48	\$36,301.36	\$5,717.39	\$36,301.36	\$5,717.39	
PPD	Continuing Care PPD	STEP1	\$0.00	(\$1,032.20)	\$0.00	(\$2,156.57)	\$0.00	(\$2,156.57)	
RENTAL	Machine Rentals	STEP1	\$0.00	\$50.00	\$0.00	\$709.60	\$0.00	\$709.60	
STEVE	Steve Fraiser	STEP1	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	
WALLY	Wallace Semper	STEP1	\$36,517.73	\$6,559.54	\$65,993.27	\$15,334.74	\$65,993.27	\$15,334.74	

View Salesman Info Show Obsolete? **Sort/Search/Total:** 15 Salesmen
 Graph Selected Column To Sort, Search or Total a Column, Right-click on the column.
 Print/SaveToFile Modify Salesman Goals

Connected to Server STEP1 Software v7.3761 Sanibel WALLY



Precision Marketing



Precision Marketing

- All you have to do is decide on a topic...



Precision Marketing

- All you have to do is decide on a topic...
- They do the rest:
 - Email
 - Reports on customer response by rep
 - Banner for your J&M shopping cart
 - Themed Flyers with individual rep contact info
 - Timed social posts for your Facebook account
 - Landing Page(s) on website



Precision Marketing

- Current users report instant payback!



Precision Marketing

- Current users report instant payback!
- ...And often the vendor featured will pay for it



Dispenser Manager



Dispenser Manager

- Most GAIN for the least PAIN of any STEP1 Strategic Element



Dispenser Manager

- Most GAIN for the least PAIN of any STEP1 Strategic Element
- Probably no more than 30 minutes for you to complete the project. Maybe half that time



Dispenser Manager

Modify Item Information

1 Ply Jumbo Tissue PT20112

Main | Cost/Purchasing | Pricing | G/L | BreakCase | SDS/HazMat

Item Description: 1 Ply Jumbo Tissue Lock Description? **Item Type:** Stock Item (I)

Extended Desc:

Sub-Category: PAPER: Universal Tissues Item Code: PT20112

Primary Supplier: Papercraft/A.W. Mendenhall Item Bar Code: PT20112

Supplier Part #: PT20112 Obsolete Item?

Supplier Bar Code: ReOrder Item?

Alt Supplier: (No Supplier Assigned) UserDefined1:

Alt Supplier Part #: UserDefined2:

Stock Unit: Case SDS? **Y**

Item Sales Class: (X = Discontinued) HazMat? **N**

Key Code: BreakCase? **N**

Dispenser/Refill: (D/R/N: Dispenser/Refill item/Neither)

Item Comments:

2000'

Replacement Item

WebCat MfgCode: BAYW

WebCat PartNum: 20029

Catalog Item?

PriceList Item?

Taxable Item?

Review Orders?

Commission?

Serial # Item?

Service Item?

Service Warranty: (No Warranty)



Dispenser Manager

Sales Manager * V737Demo Supply Co.

File Search Reports SavedQueries Help

Summary | Sales Offices | Salesmen | Leads | Review Orders | Key Customers | All Customers | Products | **Dispenser Sales** | Orders | Quc

CustomerName	CustAcct	SalesClass	Sales	Profit	Margin	SalesRep
▶ Randolph Central Sch Corp	RANCSC345	D	\$0.00	(\$571.20)	0	STANTON
Outlander Boy Scout Camp	OUTLA100	C	\$0.00	(\$28.56)	0	GJONAS
Courtyard Marriott	COURT100		\$0.00	(\$10.60)	0	MHUGHES
Milto Cleaners & Laundry	4555		\$0.00	(\$5.30)	0	MHUGHES
Moose Lodge	MOOSE100	D	\$24.78	\$17.64	71.2	GJONAS
American Wrench & Tool	AMEWR100	D	\$24.78	\$17.64	71.2	JMAKI
SEC Enterprises, LLC	4363	X	\$52.19	\$23.28	44.6	BOBT
Hamilton Heights School Corp	3236	C	\$50.00	\$23.50	47	GJONAS
Borden's Ax Company	BORDE100		\$56.62	\$23.55	41.6	JALTAIRS
Semper Supply	CRYER100	D	\$234.77	\$35.22	15	WALLY
Cash Sales-Customer's W/O Accout	CASH	A	\$70.79	\$35.23	49.8	WALLY
Buffalo Bar & Grill	BUFFA100	D	\$59.46	\$38.04	64	WALLY
St Maria Goretti	3516	B	\$174.18	\$49.30	28.3	GJONAS
Armadillo Floors	ARMAD100	C	\$424.86	\$60.13	14.2	WALLY
Westbrook Comm Schools Corp	WESTB100	A	\$432.65	\$139.40	32.2	GJONAS
Intelex, Inc.	4218	C	\$377.27	\$165.25	43.8	PLEWIS
			13,320.85	3,332.12	25.0	

Customer Sales Detail **Total Sales of Dispensers and Refill Items Since 2014** 22 Customers

Customer Status Check

Print/SaveToFile Sales Since: 2014 ReCalc Customer Totals

Connected to Server STEP1 Software v7.3761 Sanibel WALLY



Dispenser Manager

Customer Dispenser/Refill Item Sales Analysis since 2014

File Search

Randolph Central Sch Corp

Total Dispenser/Refill Item Sales: **\$0.00** Profit: **(\$571.20)** Margin: **0.0%**

Summary by Category | Summary by Item | **Item Sales by Year**

ItemCode	ItemDescription	SubCat	DR	Year	Sales	Profit	Margin	TotalQty	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
CHEMICALS																				
YH250-06	1250ml Foaming Dispenser,Gray	10-HANDZ	D	2016	\$0.00	(\$71.40)	0.0	20	20	0	0	0	0	0	0	0	0	0	0	0
				2015	\$0.00	(\$499.80)	0.0	140	0	0	0	0	100	0	0	34	6	0	0	0



SUM - Supply Usage Manager



SUM - Supply Usage Manager

- This strategic product is designed to help you attract and keep major pieces of business.



SUM - Supply Usage Manager

- This strategic product is designed to help you attract and keep major pieces of business.
- Helps you with all 3 issues for major accounts:
 - Budget control by location
 - Theft control by item by location
 - Item use compliance by location

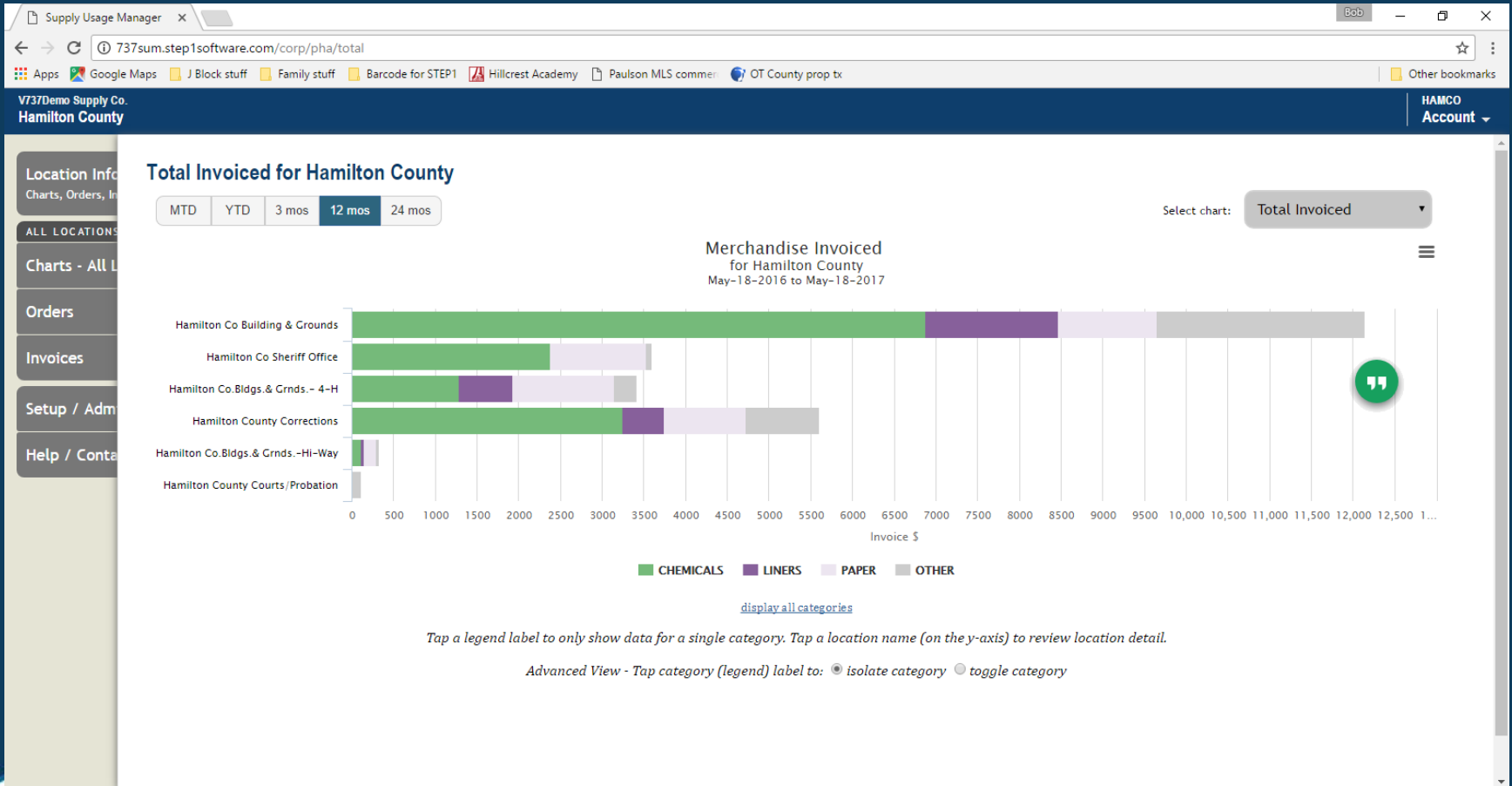


SUM - Supply Usage Manager

- This strategic product is designed to help you attract and keep major pieces of business.
- Helps you with all 3 issues for major accounts:
 - Budget control by location
 - Theft control by item by location
 - Item use compliance by location
- Gives you something refreshing to lead with when approaching new business



SUM – Supply Usage Manager



SUM - Supply Usage Manager

- There is a breakout session on this product, it's in the Web Sales Rep class.



What's stopping you?

- ...from using technology to help your sales?



What's stopping you?

- ...from using technology to help your sales?
- The 'Person In Charge' (owner, GM, Sales Mgr) has not embraced it or prioritized it.



What's stopping you?

- ...from using technology to help your sales?
- The 'Person In Charge' (owner, GM, Sales Mgr) has not embraced it or prioritized it.
- The wrong person is trying to spearhead it (usually the Office Manager or Supervisor) (many tales of woe)



If that's a problem what's the plan?



If that's a problem what's the plan?

- Keep on trying!



If that's a problem what's the plan?

- Keep on trying!
- Pick small battles that will have big gains to get things started and see how far you get.



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- We need to address this somehow – otherwise the ageing sales force and complacency will eventually kill the company (abjx story)



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If that's a problem what's the plan?

- Keep on trying!
- Pick small battles that will have big gains to get things started and see how far you get.
- We need to address this somehow – otherwise the ageing sales force and complacency will eventually kill the company
- How about talking the owner or person in charge into coming to SUGM?



If we're committed then what?



If we're committed then what?

- Work towards bringing new blood into the sales force. Utilize STEP1 Strategic Elements to help:



If we're committed then what?

- Work towards bringing new blood into the sales force. Utilize STEP1 Strategic Elements to help:
 - Web Sales Rep & CRM
 - J&M ERA
 - On Point Training
 - ...and your own expertise!!!



If we're committed then what?

- Concurrently, work towards the goal of a well directed sales department!



Managerially Directed Sales Force

- We need to transition our reps from being Self Directed to being Managerially Directed
- BUT, we need to partner with our reps, not treat them as adversaries.
- ...AND, we need to hold them accountable.



Managerially Directed Sales Force

- Managerially Direct them *HOW??*



Managerially Directed Sales Force

- Managerially Direct them *HOW??*
 - By guiding their **PRICING** so we don't lose margin from arbitrarily assigned special prices.



Managerially Directed Sales Force

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 - By looking for low-hanging fruit that existing accounts should be buying.



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 - By guiding their **PROSPECTING** so we leverage our strengths.



Managerially Directed Sales Force

- Managerially Direct them *HOW??*
 - By guiding their PRICING so we don't lose margin from arbitrarily assigned special prices.
 - By looking for low-hanging fruit that existing accounts should be buying.
 - By guiding their PROSPECTING so we leverage our strengths.
 - We can't direct them if we can't connect to them!



How Connected are your Reps?

- Survey



Legacy of this Class



Legacy of this Class

- ABCD Rankings of customers
- Ave GP Per Invoice
- 'D' accounts, problems with, and how to contain



ABCD Ranking of Accounts:

	Sales/yr	GP/yr
• A accts	\$15,000+	\$5000+
• B accts	\$5,000	\$1500
• C accts	\$2,000	\$750
• D accts	<\$2,000	< \$750/yr



Ave GP per Order:

- Current Benchmark Group Average is \$128. per order of gross profit.
- After rebate is \$148. per order.



Managing small orders:

- A accounts – evaluate and fix where possible, but don't worry about these unless the small order % is too high.
- B accounts – same
- C & D accounts – impose rules so it is impossible for these accounts to give you a bad order.



Managing 'C' and 'D' Accounts:

- Meaningful minimum order or small order charge – especially now in 7.38!
- No backorder privileges
- No special order privileges
- Charge for Delivery
- No Commissions.

Pick any 2 of the above and you will improve your bottom line significantly



Advanced Strategic Elements

- (if time permits!)



Advanced Strategic Elements

- Dimensions Business Intelligence



Advanced Strategic Elements

- Dimensions Business Intelligence
- Campaign Manager (Dimensions)



Advanced Strategic Elements

- Dimensions Business Intelligence
- Campaign Manager (Dimensions)
- Market Catalogs (Catalog Builder)



Advanced Strategic Elements

- Dimensions Business Intelligence
- Campaign Manager (Dimensions)
- Market Catalogs (Catalog Builder)
- Market Price Plans (Customer Price Manager)



Advanced Strategic Elements

- Dimensions Business Intelligence
- Campaign Manager (Dimensions)
- Market Catalogs (Catalog Builder)
- Market Price Plans (Customer Price Manager)
- J&M ERA



Marketing Basics



Branding



Branding

- Logo – every decade you need to freshen it up! ...and no more often than every 5 years.



Branding

- Logo – every decade you need to freshen it up! ...and no more often than every 5 years.
- ...and we practice what we preach!!



Branding

- Logo – every decade you need to freshen it up! ...and no more often than every 5 years.
- NOTE: That doesn't mean completely changing it, just update it in most cases.



Branding

- Logo – every decade you need to freshen it up! ...and no more often than every 5 years.
- NOTE: That doesn't mean completely changing it, just update it in most cases.
- Your logo is the cornerstone of your image! Don't neglect it if it needs updating!



Branding

- Logo
- Your Website – like it or not, your website *is* your company's image to anyone who doesn't know you.



Branding

- Logo
- Your Website – like it or not, your website *is* your company's image to anyone who doesn't know you.
- This also includes having On Line Ordering capability and an on-line catalog. Customers and prospects alike *assume* you have it!!



Branding

- Logo
- Website
- Company Facebook Page



Branding

- Logo
- Website
- Company Facebook Page
- Business Cards – your main marketing piece!
Make sure they make a positive statement
about your company!



Branding

- Logo
- Website
- Company Facebook Page
- Business Cards – your main marketing piece!
Make sure they make a positive statement
about your company!
- ...and don't forget Company Shirts with Logo!



Branding

- Logo
- Website
- Company Facebook Page
- Business Cards & Shirts
- Truck Signage & Driver Uniforms



Branding

- Logo
- Website
- Company Facebook Page
- Business Cards & Shirts
- Truck Signage & Uniforms
- Building Signage & Appearance



Branding

- Logo
- Website
- Company Facebook Page
- Business Cards & Shirts
- Truck Signage & Uniforms
- Building Signage & Appearance
- Interior Signage, Banners, also Classroom



Bob's 'Top 3' Picks:

- Logo
- Website
- Company Facebook Page
- Business Cards & Shirts
- Truck Signage & Uniforms
- Building Signage & Appearance
- Interior Signage, Banners, also Classroom



Bob's 'Top 3' Picks:

- #1 Logo – first step to successful *branding*
- Website
- Company Facebook Page
- Business Cards
- Truck Signage
- Building Signage & Appearance
- Interior Signage, Banners, also Classroom



Bob's 'Top 3' Picks:

- #1 Logo – first step to successful *branding*
- Website
- Company Facebook Page
- #2 Biz Cards – easiest fix, all of you use them
- Truck Signage
- Building Signage & Appearance
- Interior Signage, Banners, also Classroom



Bob's 'Top 3' Picks:

- #1 Logo – first step to successful *branding*
- #3 Website – First place a prospect looks
- Company Facebook Page
- #2 Biz Cards – easiest fix, all of you use them
- Truck Signage
- Building Signage & Appearance
- Interior Signage, Banners, also Classroom



Branding:

- Keep up the good work!



Thank You!

