Dimensions CRM

Customer Review:

- The Customer Review is the key component to help transition a sales rep from an everyday order taker to opportunistic strategic rep who is a more successful and profitable piece of your business.
- The purpose of the Customer Review is to give the rep enough information so they can have their 'game face' on when they go into an appointment

Customer Score Card – tracks on calendar year and fills when month completes

Here you will find comparisons for Sales, GP, Ave.GP/Order, and GP% all with CY/PY comparisons for Year to Date, Last Three Months and Last Month

- Colors of the arrows indicate:
  - **Green** – increase over the same period last year (.01% or more)
  - **Yellow** – equal to or lower than the same period last year but within 10% (.00% to -10%)
  - **Red** – decrease over the same period last year over 10% (-10% or more)

Category Score Card – tracks for 12 months w/ PY comparison

Here you will see how this customer is performing in each Item Category

- Category Score Card gives you both alerts and opportunities
- Colors of last sale date indicate:
  - **Green** – last sale is within 3 months
  - **Black** – last sale is between 3 and 6 months
  - **Red** – last sale is 6 months or longer

Dispenser/Refill Information – tracks for 12 months

Displays which Dispensers your customer has and what Refills they have been buying

Opportunities

Opportunities are what you want to do with a customer or prospect (Future)

- Examples: suppose you notice that during your sales call that you are not getting the glove business, you could name the opportunity 'Gloves' or there may be a department within the customer that you need to penetrate, name the opportunity 'Grounds Maintenance'
  - Click on the + to add a new opportunity and name the opportunity i.e. 'Gloves, Grounds Maint.'
- Now one can add the following to the Opportunity

- Milestone - used to track progress through the sales cycle and forecast potential revenue coming down the pipeline
    - Give a $ value to the Milestone (this is an estimate of annual sales for the opportunity)
    - Be sure to change the Milestone after each process of the sales cycle for the opportunity
- Competitor – so the rep knows who they are up against, one can make a game plan if opportunities are continually being lost to a certain competitor
- Category – helps the rep remember what to be focusing on for the opportunity

Activities

Activities are what you just did (History), designed to be done right when the rep returns to his/her car

- Click on the + to add a new activity
    - Fill out what is related to the Activity (you do not have to fill everything out)
    - Category, Sub-Category, Supplier, Campaign(if directed at a Campaign) all flow back into Dimensions for more in-depth analyzing and these will also populate in the Sales Rep Review portion of CRM
    - If you set an appointment for another time, put the date in the 'follow-up date' area and it will be put on your calendar in CRM(if you are using Outlook, click the Outlook button and the appointment will be added to your Outlook calendar)
    - Fill out the Memo portion to add more detail to the Activity
- Importance of Activities being entered
    - Helps to keep the reps on track and organized on what they have been doing with their customers in the past to look back on, keeps history for activities if customers were to be reassigned (same applies to prospects)
    - Gives the reps and management something to attribute an increase in sales to customers, a form of gratification
    - Lastly, Activities is *NOT* meant to make a rep feel like 'big brother' is watching over them but more of a way for the management team to work with the reps

Notes

Notes are used to communicate between staff members in the company, a communication and documentation library for all in the company to see

- This is all integrated with SNAP (STEP1 Notes And Photos)

Calendar

Very handy tool for your sales reps to keep track of their schedule and operates like most calendars

- If an appointment is set for a customer, open the apt., click on Goto Account and you can go directly to the Customer Review for this account

Prospects

When working with Prospects in CRM, Contacts, Opportunities, Activities, Notes all work the same way.

Sale Rep Review

Sales Rep Review is like the Customer Review except it is measuring the rep's performance

Sales Rep Scorecard

This is just like the customer score card with comparisons for Sales, GP, Ave.GP/Order, and GP% all with CY/PY comparisons for Year to Date, Last Three Months and Last Month but with the addition of a few more fields

Category/Group/Class/Vendor Score Card

Here you will find figures for Item Categories, Market Groups, Sales Classes, and Vendors for Sales and Gross Profit all with CY/PY comparisons for the sales rep that is chosen, goals can be set up for these as well

- Click on a category and it will show each customer and how they are performing in that category
- Here the rep can benchmark himself against the company

New Customers

A very important part of Sales Rep Review is tracking New Customers, this gives you a running 13 months, this will tell you if the new customers have been serviced and continuing to be good customers, click on Customer List to see data of new customers.

Campaigns

Campaigns are set up in Dimensions and are meant to be companywide to help direct the rep on what to focus on.

Administration

Here Management can modify descriptions of Activity Types, Milestones, Opportunity Sources, Opportunity Types and Competitors. V738enhancements -Sort Values and Active/Inactive

- Lists – Activity and Opportunity Lists – all activities and opportunities are located here
- Opportunity Status – dashboard for your pipeline of new business
- Prospect Admin – Reassigning Prospects late v737enhancement