

Dimensions

Introduction and navigation of Dimensions

The main intent of Dimensions is for the user to locate strengths or weaknesses within their company to develop an action plan to help you from losing customers, increase sales with your current customer base, and to help increase margins!

Navigation of the blue bar and functions of buttons

Work from left to right

- Choose a View
 - Sales Activity Customer Base Service Levels
 - Order Analysis Trend Analysis Market Analysis
 - Headcount Analysis Strategic Pricing AR Analysis
- Choose Dimensions
 - These are specific to the View that is chosen
 - You cannot Select a Dimension with an “All” filter first and then Select a Dimension that is more specific – by doing so you will get an error
- Choose a Cost
 - Avg. Cost
 - Comm. Cost
 - Publish Cost
 - Rebate Cost
- Choose a time period
 - If you choose “Last X Months” you must Select a Dimension with an “All” filter
 - When choosing Yearly – data for all months this calendar year will be displayed
 - When choosing Monthly – data for the last complete month will be displayed
- Run Report
 - This will run the view that you have chosen with the Dimensions you have selected
- Clear
 - This will clear all data that is displayed
- Saved Reports button
 - This is a great tool for running views/reports that you frequently visit
- XLS button
 - Used for exporting the view to an Excel Spreadsheet
- Email button
 - Used for emailing a view

Keep in mind when running Dimensions, the cleaner your data the better results you will have.

Three views to visit the beginning of every month

- Sales Activity – run monthly and yearly timeframes
 - Sales, GP, Avg.GP/Order, GP%
- Customer Base
 - View of all customers in your data base broken down
 - Total New Active Lost Regained
- Service Levels
 - Measurements on company logistics
 - Fill Rate/Line Fill Rate/Order
 - Avg./Days to Ship Avg./Days to Bill

Views used to help build a Strategy

- Sales Activity
 - Locate whether you are up/down in Sales, GP, GP%, or Avg. GP/Order
 - Item Sub Category Item Category
 - Market Group Sales Class
 - This could be a combination of any of the above if you choose

Once you determine within your company where you want to increase performance among certain Market Groups and Sales Classes you will then be able to use the more *Strategic* views to increase performance within that certain group.

- Market Analysis
 - Where has your company potentially lost a piece of business
 - Who isn't buying that should be
 - Locating your top selling items
- Strategic Pricing
 - Moving margins in a positive direction

A great way to implement the Strategy you have come up with is by utilizing the two tools within Dimensions that work with CRM and those are Campaign Manager and Goals Worksheets.

- Campaign Manager – use as a whole with the company, more companywide goals
- Goals Worksheet – use to treat each rep differently, more specific with metrics