



Customer Relations

Bridging the Integration into 2021

EMERY•JENSEN
DISTRIBUTION
an AWH company

What is the biggest integration gap between now and 2021 for the sales team?

- Customer Service Support
- Seller Knowledge Continuity
- Sales Initiative Progress Tracking

A close-up photograph of a person's hand pointing at a screen. The person is wearing a white button-down shirt. The background is blurred, showing more of the person's torso and arm.

CRM

CRM not only creates a place to store Leads and Opportunities, it houses the history of our interactions with our customers.



Management

Sellers have a central location to organize their priorities

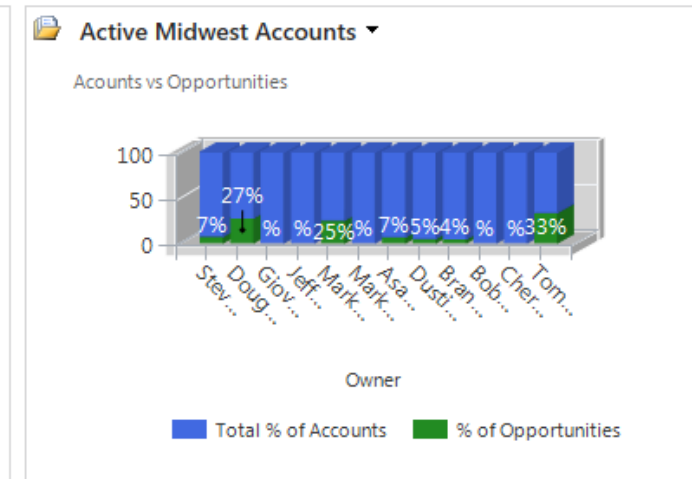
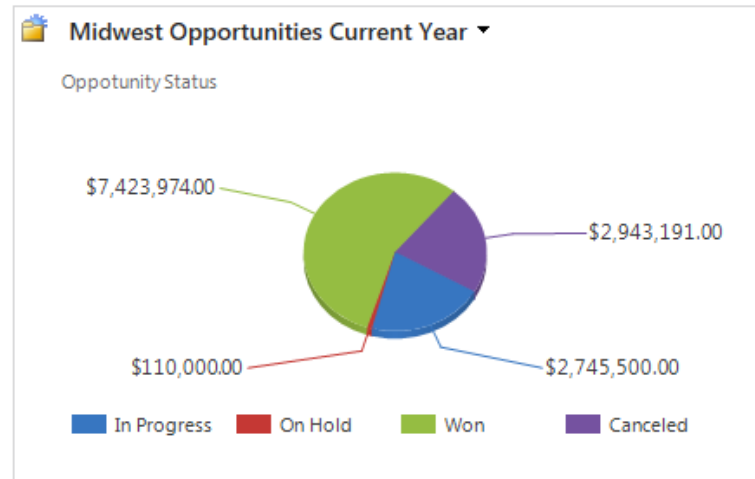
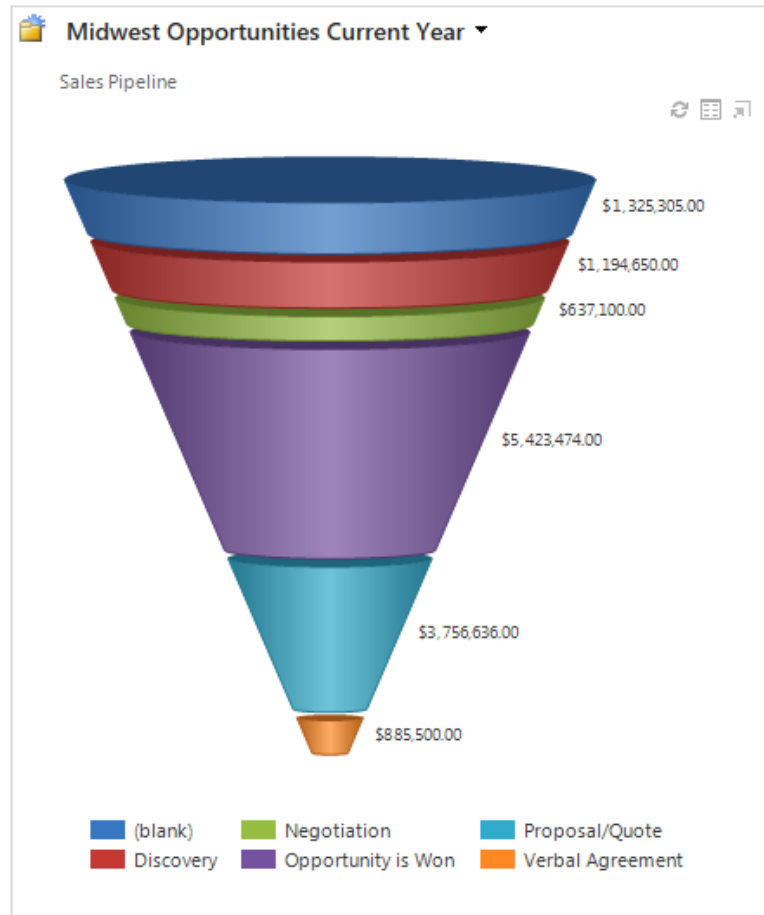
How to keep track of dual accounts?

- CRM already has sales numbers and account information for both Emery Jensen and Jensen.
- CRM Outlook integration makes it easy to track emails, appointments and important documents.
- CRM really supports our Value Prop of Most Knowledgeable People with customer communications history and tracking.

CRM Dashboards

CRM has many customizable dashboards for a quick read on opportunities and initiative progress.

Dashboard: Midwest Pipeline Overview ▾



Opportunities Midwest Opportunities Current Year ▼					
				Search for records	
<input type="checkbox"/>	Owner	Account	Topic	Est. Revenue ▼	Created On
<input type="checkbox"/>	Asa Sprague	Jerry's Home Improvement	NEW GLOVE SET OPPORTUNITY	\$25,000.00	6/10/2019 7:23...
<input type="checkbox"/>	Steve Phillips	HD Supply Corporate Office	Hudson sprayer buy	\$8,500.00	10/16/2019 9:05...
<input type="checkbox"/>	Steve Phillips	HD Supply Corporate Office	Tailgater BBQ order	\$34,000.00	10/1/2019 5:20...
<input type="checkbox"/>	Asa Sprague	Bi Mart #601	HOLIDAY ORDER	\$50,000.00	1/28/2019 10:32...
<input type="checkbox"/>	Asa Sprague	Cascade Farm and Outdoor #401	HOLIDAY ORDER	\$1,600.00	1/28/2019 10:30...
<input type="checkbox"/>	Steve Phillips	HD Supply Corporate Office	Builders hardware (Hillman)	\$100,000.00	12/28/2018 3:34...
<input type="checkbox"/>	Tom Webster	Friedman's Home Imp Santa Rosa	Pipe Insulation	\$20,000.00	12/28/2018 3:34...
<input type="checkbox"/>	Doug Belshiem	Dixieline Lmb & Home Cntr #01	Westinghouse Fans	\$100,000.00	10/21/2019 8:53...



CRM versus Salesforce

National scale with a local touch: Sellers can be located anywhere while still maintaining transparency with customer service and management.

Comparison

Although Dynamics CRM and Salesforce are similar there are some important differences.

Dynamics CRM

- CRM is implemented, affordable, customizable and in use now!
 - CRM already has many customizations that reflect how we do business today and can be customized for the new Emery Jensen business model.
 - Easily add tracking for *Evolution* customer participation.
 - CRM already gets a feed from the Emery Jensen system for customers and their sales data.
 - Accounts can be merged to their Emery Jensen counterpart at integration so no history is lost.
 - Leads, Contacts and Opportunities can be imported into Salesforce in 2021.

Salesforce

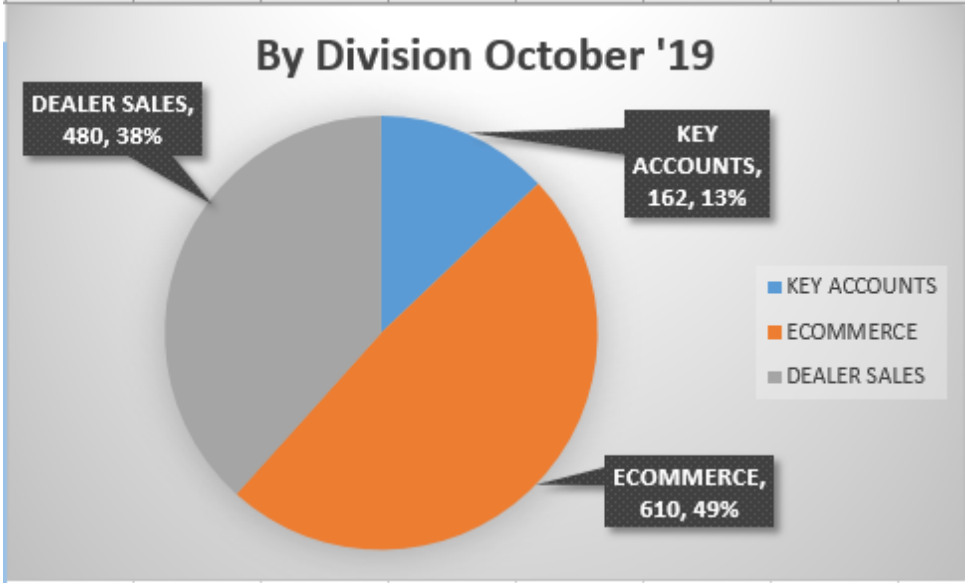
- Won't be available until 2021.
 - Will be completely new and untested from a Sellers standpoint.
 - Could need further modifications to make it effective that will take additional time to program.

Customer Service

The Jensen customer service team uses Cases in CRM to manage our customers' requests.



- Service system for customer inquiries, including credit requests, makes it very easy to manage a high volume of cases.
- Sellers can instantly see the most recent cases for use as talking points.



Information

- General
- Details
- Marketing
- Sales Information
- Preferences
- Notes & Activities
- Contacts

Related

- Invoices
- Service
 - Cases
 - Contracts
- Marketing
 - Campaigns
 - Marketing Lists

Account

Wayfair LLC

Primary Contact

Credit Limit

Preferred Method of Contact

Any

Annual Purchase Potential

Cases

Case Associated View

Filter on: Active

Include: Related "R"

<input type="checkbox"/>	Title ▲	Status	Case Number
<input type="checkbox"/>	Action Required: Daily Pending Credit Report	Active	JDS-123536-H7N5Y1
<input type="checkbox"/>	Action Required: Daily Pending Credit Report	Active	JDS-123585-Q7Q3G9
<input type="checkbox"/>	Action Required: Return Shipment Notification - (ID=1000...	Active	JDS-123576-R4Q3M7
<input type="checkbox"/>	New Credit Alert	Active	JDS-123373-J7F3Q4

CRM Email Automatic Routing

Emails to customerservice@jensenonline.com become cases in CRM and assigned a unique case reference number.

Cases Active Cases ▾						Search for records
<input type="checkbox"/>	Title ▲	Case Number	Customer	Priority	Owner	Created On
<input type="checkbox"/>	Action Required: Daily Pending Credit Report	JDS-123536-H7N5Y1	Wayfair LLC	Normal	Kellie Allen	11/14/2019 4:55 AM
<input type="checkbox"/>	Action Required: Daily Pending Credit Report	JDS-123585-Q7Q3G9	Wayfair LLC	Normal	Kellie Allen	11/15/2019 4:41 AM
<input type="checkbox"/>	Action Required: Return Shipment Notification - (ID=1000...	JDS-123576-R4Q3M7	Wayfair LLC	Normal	Kellie Allen	11/14/2019 3:31 PM
<input type="checkbox"/>	CHARGEBACK 7000023563	JDS-123295-V3Y7L9	City Mill #07 Mililani	Normal	Kellie Allen	11/6/2019 1:34 PM
<input type="checkbox"/>	CREDIT PO 6000023378 JD08K (MILWAUKEE)	JDS-123100-N4R2Z4	City Mill #06 Hawaii Kai	Normal	Kellie Allen	10/31/2019 9:27 PM
<input type="checkbox"/>	CREDIT PO 6000023788 (AIR COMPRESSOR) JENSEN	JDS-123583-F4Y5L8	City Mill #06 Hawaii Kai	Normal	Kellie Allen	11/14/2019 7:25 PM
<input type="checkbox"/>	CREDIT PO#3300023204	JDS-122549-K8F2Y7	City Mill #33 Ewa Beach	Normal	Kellie Allen	10/18/2019 11:09 AM
<input type="checkbox"/>	FW: C/B PO 2000038944	JDS-122411-R2Q9P5	City Mill #02 Kaneohe	Normal	Kellie Allen	10/15/2019 4:16 PM
<input type="checkbox"/>	FW: CREDIT PURCHASE ORDER #4000023274	JDS-119538-N1W4Z9	City Mill #04 Pearl City	Normal	Zack Goodm...	8/26/2019 4:50 PM
<input type="checkbox"/>	Fwd: Misshipped item	JDS-123127-H4J7T4	City Peoples Garden Store-...	Normal	Zack Goodm...	11/1/2019 12:25 PM
<input type="checkbox"/>	Issues in regards to PO# JENS-6367/MO# [Virventures ref...	JDS-120957-W9X4D4	Virventures INC	Normal	Kellie Allen	9/18/2019 10:13 AM
<input type="checkbox"/>	Issues in regards to PO# JENS-7754/MO# [Virventures ref...	JDS-123567-S0X1M0	Virventures INC	Normal	Kara Avila	11/14/2019 12:25 PM
<input type="checkbox"/>	Issues in regards to PO# JENS-7840/MO# [Virventures ref...	JDS-123393-F7W0T2	Virventures INC	Normal	Kara Avila	11/10/2019 11:46 AM
<input type="checkbox"/>	Issues in regards to PO# JENS-7859/MO# [Virventures ref...	JDS-123584-Z8S5M4	Virventures INC	Normal	Megan Mac...	11/14/2019 9:20 PM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123361-P0L3F9	The Mill Yard	Normal	Zack Goodm...	11/8/2019 12:56 PM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123531-S5B4M7	East Sacramento Hardware...	Normal	Kellie Allen	11/13/2019 5:50 PM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123560-P3Y8P0	CRM Unassigned Cases	Normal	John Pollet	11/14/2019 11:23 AM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123563-B6H0J2	CRM Unassigned Cases	Normal	John Pollet	11/14/2019 11:51 AM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123566-K7M4C0	CRM Unassigned Cases	Normal	John Pollet	11/14/2019 12:20 PM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123571-S2L7R5	CRM Unassigned Cases	Normal	John Pollet	11/14/2019 1:39 PM
<input type="checkbox"/>	Jensen Credit Request Submitted	JDS-123572-L2J9T1	CRM Unassigned Cases	Normal	John Pollet	11/14/2019 2:05 PM

CRM has standard and customizable
dashboards and charts

Sales Initiative Progress Tracking



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D I S T R I B U T I O N
— an AWH company —

Customer Sales and Opportunities

- Each customer in CRM has sales information the seller can access anytime. This along with tracking national program participation like Evolution or GAP can really help sellers reach company goals.

Open Opportunities National Programs

Search for records

OWNER	ACCOUNT	NATIONAL PROGRAM	TOPIC	EST. REVENUE
Brandon Deboer	Zuern Building Products	Store Conversion	Cedarburg Store Conversion	\$80,000.00
Brandon Deboer	Schoeneman Bros. Co. - L...	Pro/Paint	Schoenemans Sioux Falls Conversion	\$200,000.00
Brandon Deboer	Future Designs, Inc.	Category Conversions	Door Locks Program	\$200,000.00
Brandon Deboer	Risto's Hardware	Category Conversions	Lightbulbs	\$15,000.00
Brandon Deboer	Risto's Hardware	Category Conversions	Faucet - 8 or 12 ft POG	\$6,000.00
Brandon Deboer	Risto's Hardware	Category Conversions	Danco POG - 8 FT	\$1,300.00
Mari Kruse	Forest Lumber Inc.	Store Conversion	Store conversion	
Tom Peterson	City People's Merc-Sndpt	Seasonal - Holiday	Emery-Jensen Holiday promotion: Halloween	
Tom Peterson	City People's Merc-Sndpt	Seasonal - Holiday	Emery-Jensen Holiday Promotion: Christmas	
Steve Vanderpan	HPM Building Supply Hilo ...	Category Conversions	Ames True Temper long handle tool POG (28 ft)	
Steve Vanderpan	HPM Building Supply Hilo ...	Category Conversions	Gardner Bender electrical connector POG (16 ft)	

Sales Information

Sales Summary

Sales Ranking	7	Year to Date Sales	\$269,375.59
Gross Profit %	10.18	Last Year Sales	\$439,663.58
DC Gross Profit %	15.77	Year to Date Goal	\$443,706.33
Line Value	\$31.23		
YTD Sales Change	-38.73		
Current Month Sales	\$7,273.12		
Last Year Month Sales	\$30,140.45		
Month to Date Goal	\$17,802.28		
Change from Last Year Month Sales	-75.87		
% of Territory Total	4.85		
Cumulative %	51.20		
Year to Date Orders	187		

Sales Summary by Account
SalesFields

Soldo...	Account Name	YTD	LYS	Goal
		\$269,375.59	\$439,663.58	\$443,706.33

Emery Jensen Sales Analysis Cube

Account Type

Central Account

Courtesy Account

Dealer Account

E-commerce Account

House Account

Key Account

Order Type

Credit

Credit Direct

Direct

Special Order

Warehouse

Order Origin

EJD

JDS

Month Name

January

February

March

April

May

June

July

August

September

October

November

December

Salesperson

Asa Sprague

Bob Mitchell

Cheryl Long

David Atkins

Doug Belsheim

House Account

Inside Sales

Jeff Plummer

Joe Long

Kristine Plante

Mari Kruse

Mark Gerby

Mike Fisher

National House...

Rob Wolf

Steve Groger

Steve Phillips

Steve Vander...

Tom Peterson

Tom Webster

Will Webster

Department

Automotive

Building Materials

Electrical Supplies

Hand & Power To...

Hardware

Housewares

Lawn & Garden

Paint & Paint Sun...

Plumbing & Heating

Seasonal Goods

LMC

No

Yes

OSH

No

Yes


Calendar

(Multiple Items)

Row Labels	Sales	AWH PY\$	AWH V\$	AWH V%	PY\$	V\$	V%	Goal	GV\$	GV%	DARR	Goal KPI Status
Courtesy Account	\$74,472.42	\$89,316.56	(\$14,844.14)	83.4%	\$88,984.10	(\$14,511.68)	83.7%	\$78,508.92	(\$4,036.50)	94.9%	\$432.96	
Dealer Account	\$29,462,720.58	\$29,657,210.55	(\$194,489.97)	99.3%	\$29,559,289.20	(\$96,568.62)	99.7%	\$28,875,249.67	\$587,470.91	102.0%	\$134,470.21	
House Account	(\$84,948.78)	(\$149,494.39)	\$64,545.61	56.8%	(\$149,494.39)	\$64,545.61	56.8%	(\$110,476.08)	\$25,527.30	76.9%	(\$1,041.73)	
Key Account	\$72,957,580.79	\$69,708,132.13	\$3,249,448.66	104.7%	\$69,173,705.52	\$3,783,875.27	105.5%	\$73,269,054.71	(\$311,473.92)	99.6%	\$325,907.67	
Grand Total	\$102,409,825.01	\$99,305,164.85	\$3,104,660.16	103.1%	\$98,672,484.43	\$3,737,340.58	103.8%	\$102,112,337.22	\$297,487.79	100.3%	\$459,208.39	

Management Analysis

The data used in CRM is the same data in the Emery Jensen Sales Cube and fed to Michael Stodola for reporting.



CRM reduces the need for lengthy sales meetings.

CRM Quick Campaigns

<input type="checkbox"/>	Subject	Activity Type...	Total Member...	No. of Successes...	No. of Failures...	Status Reason...	Created On ▼	Owner
<input type="checkbox"/>	Now In-Stock 11-18-19 Hardware	E-mail	29	24	2	Completed	11/19/2019 7:27...	Tom Peterson
<input type="checkbox"/>	Now In-Stock 1-18-19 Garden Center	E-mail	19	19	0	Completed	11/19/2019 7:15...	Tom Peterson
<input type="checkbox"/>	OXO Brand Information	E-mail	19	19	0	Completed	11/12/2019 3:51...	Tom Peterson
<input type="checkbox"/>	New Items 11-11-19 Hardware	E-mail	29	27	2	Completed	11/11/2019 9:40...	Tom Peterson
<input type="checkbox"/>	New, Now In Stock 11/11/19	E-mail	4	4	0	Completed	11/11/2019 8:42...	Bob Mitchell
<input type="checkbox"/>	New, Now In Stock 11/11/19	E-mail	22	18	0	Completed	11/11/2019 8:39...	Bob Mitchell
<input type="checkbox"/>	New Items L&G 11/11/19-II	E-mail	20	18	2	Completed	11/11/2019 8:35...	Tom Peterson
<input type="checkbox"/>	New Items L&G 11/11/19	E-mail	20	18	2	Completed	11/11/2019 7:26...	Tom Peterson
<input type="checkbox"/>	New At Jensen Distribution L&G 11/11/19	E-mail	20	18	2	Completed	11/11/2019 7:22...	Tom Peterson
<input type="checkbox"/>	Seed Starting ESP #840	E-mail	16	16	0	Completed	11/5/2019 8:40...	Tom Peterson
<input type="checkbox"/>	New, Now In Stock 11/4/19	E-mail	4	4	0	Completed	11/4/2019 11:26...	Bob Mitchell
<input type="checkbox"/>	New, Now In Stock 11/4/19	E-mail	22	17	0	Completed	11/4/2019 11:12...	Bob Mitchell
<input type="checkbox"/>	Firman Generators	E-mail	68	58	9	Completed	11/1/2019 11:53...	Mike Fisher
<input type="checkbox"/>	Bosch Excess Inventory Blow Out	E-mail	41	22	0	Completed	11/1/2019 11:24...	Rob Wolf
<input type="checkbox"/>	Now In-Stock 10-28-19 46 primary Contacts	E-mail	60	59	1	Completed	10/28/2019 12:4...	Tom Peterson
<input type="checkbox"/>	New, Now In Stock 10/18/19	E-mail	4	4	0	Completed	10/28/2019 12:1...	Bob Mitchell
<input type="checkbox"/>	New, Now In Stock 10/28/19	E-mail	22	20	0	Completed	10/28/2019 12:1...	Bob Mitchell
<input type="checkbox"/>	New Items	E-mail	60	59	1	Completed	10/28/2019 10:5...	Tom Peterson
<input type="checkbox"/>	Now In Stock W/Attachment	E-mail	60	59	1	Completed	10/28/2019 10:4...	Tom Peterson
<input type="checkbox"/>	New, Now In Stock 10/21/19	E-mail	22	20	0	Completed	10/21/2019 2:41...	Bob Mitchell
<input type="checkbox"/>	New, Now In Stock 10/21/19	E-mail	4	4	0	Completed	10/21/2019 2:37...	Bob Mitchell

- Top Sellers in our organization are using this feature very effectively to reach multiple customers and reduce travel.
- Great feature to expose customers to the Conversion Edge (GAP) opportunities with TM targeted customer groups.



Thank You

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Emery Jensen Distribution

