



Revenue Strategy US Dashboard

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Date Last Refreshed



Dashboard Definitions

Dashboard Purpose: Provide a visibility tool to Revenue Strategy (RS) engaged SMB Bids, RS performance, impact, and connectivity to 5+4 Marketing strategy

Prioritization Type:

- Prioritization List- Customers prioritized by Revenue Strategy teams for proactive engagement on a quarterly basis
- Non- Prioritization List- Customers requested for engagement by Sales and Marketing partners outside of Prioritization List

Bid Type:

- Protect- Customers that Revenue Strategy target to protect and keep against competitive threats
- Improve- Customers that Revenue Strategy target to improve profitability and revenue quality performance

Tactics:

- RSA- Sales Top Target/Premium Product Opportunity: Revenue Strategy Analyst tactic that shows engagements aimed at winning Sales top targets or premium product opportunities
- PSA- AE Conversion/Penetration: Pricing Support Analyst tactic that shows engagements aimed at winning Small Segment (AE) opportunities



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To Home Page:

Month Name
December

Marketing Zone
All

Engaged
All

Average Daily Zonal Snapshot



2023 YTD and YOY

Bids

67,024

ADV

3.8M

ADVYTD

-10.4%

ADVGrowth

ADNR

\$68.4M

ADNRYTD

-7.6%

ADNRGrowth

NRPP

\$18.16

NRPPYTD

3.1%

NRPPGROWTH

Profit Per Day

\$21.7M

ProfitPerDay

-13.4%

ProfitPerDayGrowth

Incentive

28.4%

Incentive_TY

-5.5%

IncentiveGrowth

FA OR

0.68

ORYTD

0.02

ORImprovement



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Average Daily Engagement Snapshot

2023 YTD and YOY

To Home Page:

Month Name

December

Marketing Zone

All

Engaged

Yes

Analyst Role

All

Analyst Name

All

Prioritized Type

All

Bid Type

All

*Data sourced from CSRT
Profit Tables

Bids

3,269

ADV

1.8M

ADVYTD

-7.2%

ADVGrowth

ADNR

\$27.1M

ADNRYTD

-7.0%

ADNRGrowth

NRPP

\$14.87

NRPPYTD

0.3%

NRPPGROWTH

Profit Per Day

\$5.8M

ProfitPerDay

-20.9%

ProfitPerDayGrowth

Incentive

39.7%

Incentive_TY

2.7%

IncentiveGrowth

FA OR

0.79

ORYTD

0.04

ORImprovement



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To Home Page:

Month Name

December

Marketing Zone

All

Engaged

Yes

Analyst Role

All

Analyst Name

All

Prioritized Type

All

Bid Type

All

Revenue Strategy YoY YTD Performance

Engaged Bids

Marketing Zone Name	Engaged Bid Count	ADV YTD	ADV YTD LY	ADV Growth	ADNR YTD	ADNR YTD LY	ADNR Growth	NRPP YTD	NRPP YTD LY	NRPP GROWTH
CENTRAL	716	328,291	352,149	-6.8%	\$5,506,306.39	\$5,661,387.28	-2.7%	\$16.77	\$16.08	4.3
CENTRAL EAST	1,080	269,464	272,361	-1.1%	\$4,565,762.54	\$4,553,466.65	0.3%	\$16.94	\$16.72	1.3
NORTHEAST	908	389,928	372,650	4.6%	\$5,979,846.30	\$5,903,820.17	1.3%	\$15.34	\$15.84	-3.2
WEST	565	831,654	963,925	-13.7%	\$11,001,609.97	\$12,959,664.70	-15.1%	\$13.23	\$13.44	-1.6
Total	3,269	1,819,337	1,961,085	-7.2%	\$27,053,525.20	\$29,078,338.80	-7.0%	\$14.87	\$14.83	0.3

Marketing Zone Name	Engaged Bid Count	Profit Per Day	Profit Per Day LY	Profit Per Day Growth	OR YTD	OR YTD LY	OR Improvement	Incentive_TY	Incentive_LY	Incentive_Growth
CENTRAL	716	\$1,440,719.68	\$1,595,910.87	-9.7%	0.74	0.72	0.02	38.3%	37.3%	
CENTRAL EAST	1,080	\$1,362,873.34	\$1,490,323.45	-8.6%	0.70	0.67	0.03	39.2%	37.6%	
NORTHEAST	908	\$1,443,020.85	\$1,842,876.07	-21.7%	0.76	0.69	0.07	38.7%	37.6%	
WEST	565	\$1,524,498.59	\$2,363,930.85	-35.5%	0.86	0.82	0.04	43.8%	43.9%	
Total	3,269	\$5,771,112.46	\$7,293,041.23	-20.9%	0.79	0.75	0.04	39.7%	38.7%	



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To Home Page:

Marketing Zone

All ✓

Analyst Role

All ✓

Analyst Name

All ✓

Prioritized Type

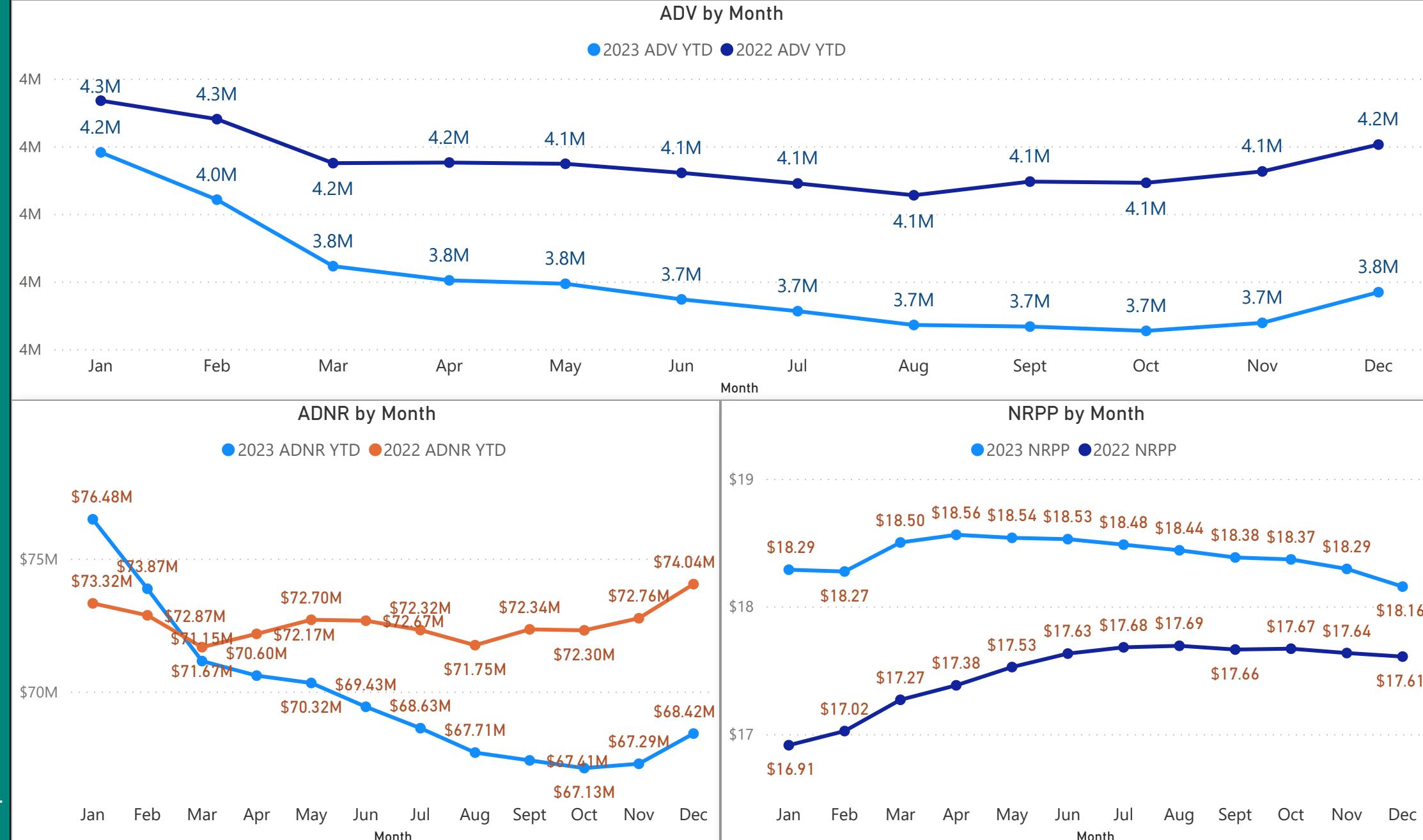
All ✓

Bid Type

All ✓

*Data sourced from CSRT Profit Tables

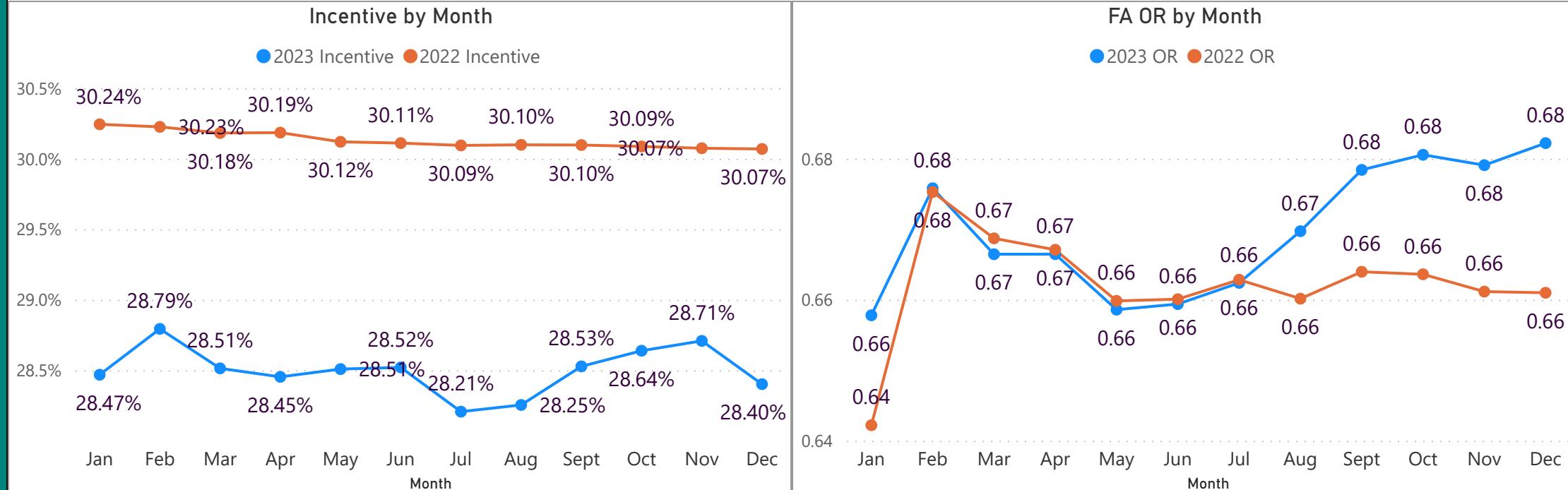
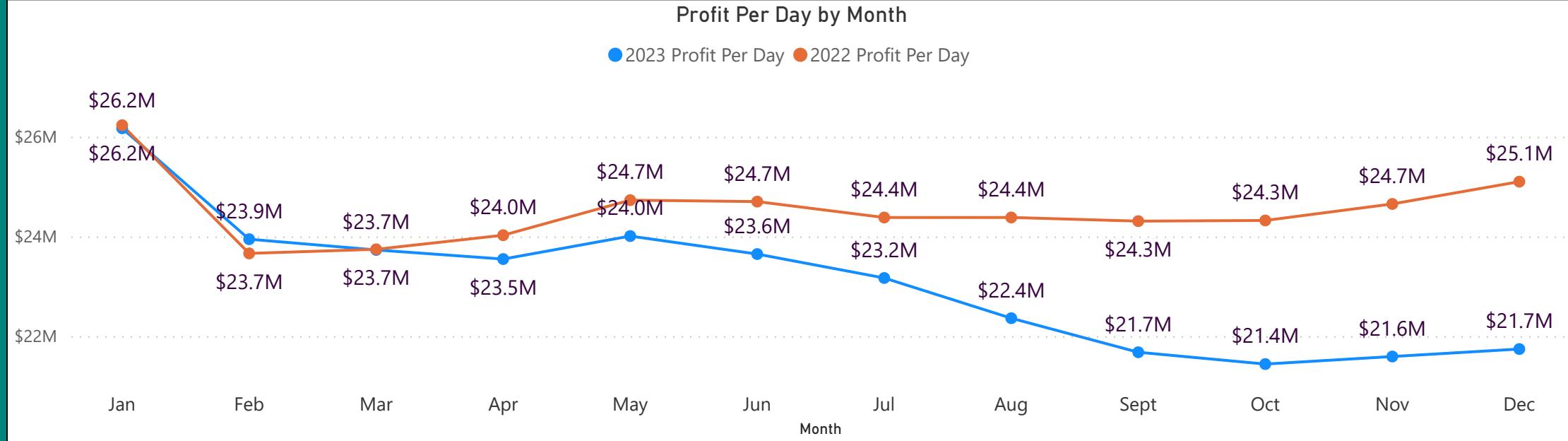
Volume and Revenue Trend





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Profit Trend



*Data sourced from CSRT
Profit Tables



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Earliest Date...

YTD Bid Performance

Customer Details

To Home Page:

Month Name

December

Marketing Zone

All

Customer Name

All

Analyst Role

All

Analyst Name

All

Prioritized Type

All

Bid Type

All

*Data sourced from CSRT Profit Tables

Bid	Engaged Bid Count	Customer Name	ADV YTD	ADV YTD LY	ADV Variance	ADV Growth	ADNR YTD	ADNR YTD LY	ADNR Variance	ADNR Growth	NRPP YTD
D000013083	1	CURRY PRINTING CO	6	6	-0.34	-5.5%	\$119.61	\$167.53	(\$47.93)	-28.6%	\$20.29
D000013636	1	ARMSTRONG SUPPLY CO	4	5	-0.64	-13.0%	\$77.84	\$80.53	(\$2.69)	-3.3%	\$18.11
D000013660	1	DIESEL PRO	12	10	1.85	18.4%	\$455.30	\$340.73	\$114.57	33.6%	\$38.27
D000016430	1	BULK VINTAGE CLOTHING	3	3	0.21	7.3%	\$110.11	\$103.14	\$6.96	6.8%	\$36.09
D000018114	1	BF MAZZEO FRUIT & PROD INC	3	3	-0.15	-5.7%	\$76.11	\$70.55	\$5.56	7.9%	\$29.84
D000021927	1	MARY'S LAND FARM	5	7	-1.86	-25.9%	\$93.13	\$120.07	(\$26.95)	-22.4%	\$17.50
D000023240	1	MARYLAND PLASTICS	14	10	4.01	38.4%	\$273.20	\$210.47	\$62.73	29.8%	\$18.92
D000023281	1	AIR REPAIR, INC	3	3	-0.11	-4.1%	\$89.08	\$107.36	(\$18.27)	-17.0%	\$35.08
D000023309	1	BLAW-KNOX CORPORATION	6	5	0.96	17.9%	\$337.14	\$264.05	\$73.09	27.7%	\$53.55
D000026386	1	FROSTY FRUIT BEVERAGE 2022	14	11	2.98	26.6%	\$270.45	\$200.69	\$69.76	34.8%	\$19.08
D000026396	1	MAPLESHADE	4	4	-0.16	-3.5%	\$217.87	\$214.45	\$3.42	1.6%	\$50.58
D000031138	1	SPIKES TROPHIES	21	23	-2.15	-9.4%	\$372.15	\$371.86	\$0.29	0.1%	\$17.91
D000032998	1	EVEREST TRADERS INC	14	17	-3.72	-21.5%	\$403.58	\$451.76	(\$48.18)	-10.7%	\$29.71
D000033178	1	TLC ANIMAL NUTRITION	17	23	-5.97	-25.6%	\$724.34	\$902.80	(\$178.46)	-19.8%	\$41.83
D000033188	1	BHS CORRUGATED-NORTH AMERICA	118	105	12.72	12.1%	\$3,361.53	\$2,697.46	\$664.07	24.6%	\$28.52
D000035708	1	ALLEN ENGINEERING	16	21	-4.68	-22.5%	\$585.69	\$820.82	(\$235.13)	-28.6%	\$36.37
D000035889	1	KINETIC SKATEBOARDING, INC.	3	3	-0.06	-2.0%	\$123.02	\$121.01	\$2.01	1.7%	\$44.83
D000036703	1	MOUNTAIRE FARMS INC.	21	23	-2.33	-10.0%	\$1,157.99	\$1,238.06	(\$80.07)	-6.5%	\$55.40
D000036704	1	SZCO SUPPLIES	73	75	-2.25	-3.0%	\$1,692.88	\$1,621.85	\$71.04	4.4%	\$23.32
D000036754	1	HURST REVIEW SERVICES	39	56	-17.62	-31.4%	\$765.73	\$1,015.43	(\$249.70)	-24.6%	\$19.89
D000036943	1	SWIMEX	3	4	-0.24	-6.6%	\$129.69	\$112.45	\$17.24	15.3%	\$38.44
D000039139	1	ARADIUS GROUP	17	24	-6.58	-27.6%	\$397.67	\$460.42	(\$62.75)	-13.6%	\$23.06
D000039156	1	AG-PAK INC 2022	9	9	-0.69	-7.4%	\$271.29	\$298.35	(\$27.06)	-9.1%	\$31.49
D000039192	1	VANCOUVER LAPTOP INC	49	126	-76.32	-60.8%	\$664.36	\$1,615.78	(\$951.42)	-58.9%	\$13.48
D000039206	1	WAZOODLE FABRICS	4	3	0.67	21.7%	\$146.30	\$105.13	\$41.17	39.2%	\$38.67
D000039300	1	SHASTHA FOODS New Deal	6	9	-3.10	-35.0%	\$144.00	\$186.30	(\$42.30)	-22.7%	\$25.00
D000043100	1	A & S SCREEN PRINTING	9	6	3.47	60.5%	\$223.98	\$141.47	\$82.51	58.3%	\$24.32
D000043116	1	BIG DESIGNS - New Deal	22	26	-3.69	-14.2%	\$598.89	\$682.96	(\$84.07)	-12.3%	\$26.81
D000043111	1	TITAN INTERNATIONAL	2	2	0.26	12.0%	\$79.12	\$79.25	\$0.08	0.1%	\$21.96
Total	67,024		3,768,621	4,205,014	-436,393.88	-10.4%	\$68,422,384.27	\$74,040,707.86	(\$5,618,323.59)	-7.6%	\$18.16



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Prioritized Bid Profit Growth - RSM and RSA

5% YOY MTC Profit Growth Goal

To Home Page:

Month Name

All

Bid Type

All

Analyst Role

All

*Data sourced from CSRT
Profit Tables

Revenue Strategy Manager	Bid Count	Profit YTD	Profit YTD LY	Profit \$ Diff	Profit Change %	Growth \$ Goal	% Eff Goal
DEVITT, JACLYN	345	\$741,297,035.31	\$691,989,745.25	\$49,307,290.06	7.1%	\$726,589,232.51	102.0%
ALANIS, CHRISTY	9	\$53,348,204.21	\$28,425,434.42	\$24,922,769.79	87.7%	\$29,846,706.14	178.7%
BALLARD, CAITLYN	10	\$14,664,868.42	\$8,703,617.77	\$5,961,250.65	68.5%	\$9,138,798.66	160.5%
CURIEL, MARY	145	\$202,818,608.54	\$254,416,691.67	(\$51,598,083.13)	-20.3%	\$267,137,526.25	75.9%
KESLER, MEG	46	\$163,108,332.23	\$174,433,433.88	(\$11,325,101.65)	-6.5%	\$183,155,105.57	89.1%
LAYNE, CECILIA	4	\$16,397,868.35	\$20,799,020.51	(\$4,401,152.16)	-21.2%	\$21,838,971.54	75.1%
LUMSDEN, DAN	57	\$109,729,720.84	\$79,996,041.60	\$29,733,679.24	37.2%	\$83,995,843.68	130.6%
OFLYNN, BRENDAN	20	\$86,695,919.52	\$54,291,017.78	\$32,404,901.74	59.7%	\$57,005,568.67	152.1%
ROPER, AMIE	15	\$14,998,432.17	\$13,972,564.08	\$1,025,868.09	7.3%	\$14,671,192.28	102.2%
ZORN, BILL	40	\$79,535,081.03	\$56,951,923.54	\$22,583,157.49	39.7%	\$59,799,519.72	133.0%
FRANK, MOLLY	464	\$1,597,942,234.70	\$1,550,671,007.05	\$47,271,227.65	3.0%	\$1,628,204,557.40	98.1%
ALANIS, CHRISTY	27	\$113,987,968.79	\$123,706,214.98	(\$9,718,246.19)	-7.9%	\$129,891,525.73	87.8%
ARNOLD, RICHARD	71	\$257,222,866.98	\$248,736,967.10	\$8,485,899.88	3.4%	\$261,173,815.46	98.5%
BALLARD, CAITLYN	23	\$87,728,472.17	\$54,379,881.67	\$33,348,590.50	61.3%	\$57,098,875.75	153.6%
CRAWLEY, SYDNEY	2	\$2,381,934.64	\$1,843,662.82	\$538,271.82	29.2%	\$1,935,845.96	123.0%
HAGLUND, BRAD	55	\$313,374,523.89	\$312,912,684.83	\$461,839.06	0.1%	\$328,558,319.07	95.4%
MALCOM, MATTHEW	22	\$86,532,326.03	\$92,314,084.28	(\$5,781,758.25)	-6.3%	\$96,929,788.49	89.3%
NAFRAWI, SHEREEN	38	\$202,206,357.66	\$169,050,739.74	\$33,155,617.92	19.6%	\$177,503,276.73	113.9%
PARDO, RYAN	122	\$52,490,340.44	\$64,887,085.63	(\$12,396,745.19)	-19.1%	\$68,131,439.91	77.0%
PARSONS, JIM	106	\$482,017,444.10	\$482,839,686.00	(\$822,241.90)	-0.2%	\$506,981,670.30	95.1%
HOEGER, SETH	236	\$714,395,981.62	\$712,546,727.25	\$1,849,254.37	0.3%	\$748,174,063.61	95.5%
BURTON JR., WILLIAM	38	\$39,238,695.98	\$40,559,288.58	(\$1,320,592.60)	-3.3%	\$42,587,253.01	92.1%
GRANT, MIKE	50	\$126,095,449.80	\$178,675,909.76	(\$52,580,459.96)	-29.4%	\$187,609,705.25	67.2%
HETTLER, JESSICA	13	\$30,397,945.98	\$34,560,978.55	(\$4,163,032.57)	-12.0%	\$36,289,027.48	83.8%
KOTLESKI, ZACHARY	8	\$25,891,911.41	\$27,665,981.68	(\$1,774,070.27)	-6.4%	\$29,049,280.76	89.1%
KRAEMER, ANN	33	\$184,930,902.42	\$147,729,618.38	\$37,201,284.04	25.2%	\$155,116,099.30	119.2%
LANG, DAN	17	\$31,488,049.24	\$38,075,568.11	(\$6,587,518.87)	-17.3%	\$39,979,346.52	78.8%
RIEGLER, MARK	43	\$179,840,032.84	\$162,291,994.52	\$17,548,038.32	10.8%	\$170,406,594.25	105.5%
Total	1,261	\$4,270,396,622.02	\$4,286,836,866.30	(\$16,440,244.28)	-0.4%	\$4,501,178,709.62	94.9%



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Non-Prioritized Bid Profit Growth

To Home Page:

Month Name ▼

All ✓

Bid Type ▼

All ✓

Analyst Role ▼

All ✓

Revenue Strategy Manager	Bid Count	Profit YTD	Profit YTD LY	Profit \$ Diff	Profit Change %
DEVITT, JACLYN	1,593	\$1,383,044,201.27	\$1,456,991,561.62	(\$73,947,360.35)	-5.1%
FRANK, MOLLY	923	\$1,235,840,220.75	\$1,582,557,433.54	(\$346,717,212.79)	-21.9%
HOEGER, SETH	1,364	\$2,028,942,121.14	\$2,409,885,388.85	(\$380,943,267.71)	-15.8%
Materi, Dan	17	\$58,139,633.94	\$68,460,505.29	(\$10,320,871.35)	-15.1%
RAMSEY, WENDY	493	\$1,006,686,737.43	\$1,505,669,528.92	(\$498,982,791.49)	-33.1%
Total	4,359	\$5,712,652,914.53	\$7,023,564,418.22	(\$1,310,911,503.69)	-18.7%



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Revenue Strategy Engaged Cultivation - Results

Results Based on Engaged Opportunities Cultivated

To Home

Analyst Role

All

Tactic

All

Opportunity Stage

CULTIVATE

Month

Multiple selecti...

Prioritization Type

All

Product Name

All

*Data sourced from CSRT
Profit Tables

Zone_Name	# of Customers	# of Opportunities	TOT_PIPE_REV	MTC_Goal	MTC%
[+] CENTRAL	232	568	\$56,325,735	\$4,467,585	1260.8%
[+] CENTRAL WEST	104	281	\$18,465,820	\$4,003,511	461.2%
[+] NORTHEAST	81	175	\$10,756,423	\$5,534,178	194.4%
[+] SOUTHEAST	119	317	\$40,210,172	\$6,564,251	612.6%
[+] WEST	25	68	\$10,730,272	\$5,005,949	214.4%
[+] WEST PLAINS	85	214	\$25,366,710	\$6,558,974	386.7%
Total	635	1623	\$161,855,132	\$32,134,448	503.7%

→ Click Here for Detail



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To Home Page:

Analyst Role

All

Tactic

All

Opportunity Stage

CULTIVATE

Month

All

Prioritization Type

All

Product Name

All

Engaged Cultivation - Detail

Detail on Engaged Opportunities Cultivated

Zone_Name	# of Customers	# of Opportunities	TOT_PIPE_VOL	TOT_PIPE_REV	TOT_PIPE_RPP
+ CENTRAL	450	1353	13,068,000	\$163,921,587	\$12.54
+ CENTRAL WEST	186	569	3,223,141	\$51,669,928	\$16.03
+ NORTHEAST	141	362	3,646,158	\$44,610,785	\$12.24
+ SOUTHEAST	182	582	8,700,892	\$133,092,700	\$15.30
+ WEST	41	139	9,160,397	\$90,846,811	\$9.92
+ WEST PLAINS	156	480	8,581,129	\$133,913,109	\$15.61
Total	1143	3485	46,379,717	\$618,054,920	\$13.33

*Data sourced from CSRT
Profit Tables

→ Click Here for MTC Results



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Revenue Strategy Engaged Opportunities - Other Stages

Active Engaged Opportunities in Stages Other than Cultivate

To Home

Page:

Analyst Role

All

Tactic

All

Opportunity Stage

All

Current Stage M...

All

Prioritization Type

All

Product Name

All

*Data sourced from CSRT
Profit Tables

Zone_Name	# of Customers	# of Opportunities	TOT_PIPE_VOL	TOT_PIPE_REV	TOT_PIPE_RPP
+	117	287	22,214,551	\$250,795,843	\$11.29
+	CENTRAL	329	14,549,223	\$858,660,644	\$59.02
+	CENTRAL WEST	127	331	10,722,849	\$150,739,145
+	NORTHEAST	107	225	14,420,329	\$172,370,524
+	SOUTHEAST	134	259	12,004,298	\$168,952,597
+	WEST	29	75	3,540,408	\$34,754,240
+	WEST PLAINS	138	342	47,547,210	\$539,414,801
Total	970	2288	124,998,868	\$2,175,687,793	\$17.41