

**\$24k Margin Opportunity**

High Discounts for product 100-1000-02

**\$21k Order at Risk?**

BIG Co. may be shifting orders of 230-999-02

**\$15k Cross-Sell Opportunity**

Cross-sell 330-998-02 to AGB Inc.



Follow-up

Alerts



### **\$21k Order at Risk?**

BIG Co. may be shifting orders of  
230-999-02



### **\$15k Cross-Sell Opportunity**

Cross-sell 330-998-02 to AGB Inc.



Follow-up

Alerts



### **\$24k Margin Opportunity**

High Discounts for product 100-1000-02



### **\$2.6m Customer at Risk?**

ACME Manufacturing shows signs of possible defection.



### **\$21k Order at Risk?**

BIG Co. may be shifting orders of 230-999-02



### **\$15k Cross-Sell Opportunity**

Cross-sell 330-998-02 to AGB Inc.



### **\$14k Order at Risk**

CMD Industries may be shifting orders of 100-1000-02



### **\$11k Margin Opportunity**

High Discounts for product 100-1000-02



Follow-up

Alerts



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### **\$14k Order at Risk**

CMD Industries may be shifting orders of 100-1000-02



### **\$11k Margin Opportunity**

High Discounts for product 002-1000-02



Follow-up

Alerts



**Tom Smith**

Mountain View, CA, USA

### **Suggestions for Higher Rank**

Discount Less - Your discounts are higher than other reps in your territory.

Charge for Shipping - With the shipping methods you use, you can ask for a higher rate.

### **Leaderboard**

1 Jeffery Affeldtt

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2 Tom Smith (Me)

---

3 Sally Higgins

---

4 Bob Baker

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5 Sarah Green



### Suggestions for Higher Rank

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### Leaderboard

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5 Sarah Green



Search Customers

A  
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Analysis Across All Customers >

A

ACME Manufacturing >

Acrow Misr >

ACT Clean Technologies Inc. >

Akatsuki Eazima Co. Ltd. >

AKD SA >

B

Berry Petroleum Co. >

Best of the Best Pic >

Bioneer Corporation >

Bold Technology Corp. >



A

ACME Manufacturing



Acrow Misr



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AKD SA



B

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Best of the Best Pic



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< Customers



**ACME Manufacturing**

Jeremy Affeldt



**\$2.6m Customer at Risk?**

ACME Manufacturing shows signs of possible defection.



**\$21k Order at Risk?**

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**Cross Sell Opportunity?**

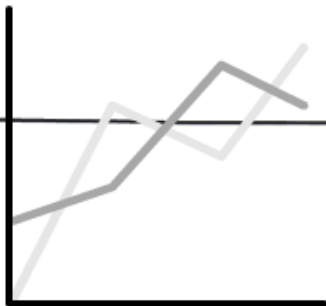
Product XYZ is usually sold with product VPH to this customer type.

Sensitive to  
Price  
Change

Provide  
best  
service

Very  
compliant  
with

**Customer Health**



< Customers



**\$2.5M Customer at Risk?**

ACME Manufacturing shows signs of possible defection.



**\$21k Order at Risk?**

ACME Manufacturing may be shifting orders of 230-999-02



**Cross Sell Opportunity?**

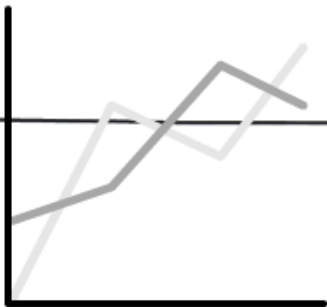
Product XYZ is usually sold with product VPH to this customer type.

Sensitive to  
Price  
Change

Provide  
best  
service

Very  
compliant  
with

**Customer Health**





\$24

margin  
opportunity

Increase your margin by \$24k annually for Product [100-1000-02](#). Analysis has identified customer transactions with high negotiated discounts when compared to similar transactions.

### Negotiated Discount Comparison



### Contributors

5 Customers:



1 Product: 100-1000-02

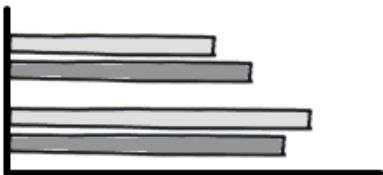


< Follow-up



Increase your margin by \$24K annually for Product [100-1000-02](#). Analysis has identified customer transactions with high negotiated discounts when compared to similar transactions.

### Negotiated Discount Comparison



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5 Customers:



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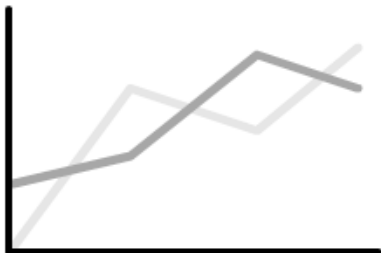




**\$21k** order  
at risk

Orders for product 100-999-90 by customer Big Co. are trending down over the last 3 months. This is a common sign that they are placing orders with competitors.

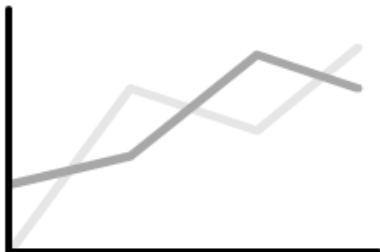
### Order History





Orders for product 100-111-10 by customer Big Co. are trending down over the last 3 months. This is a common sign that they are placing orders with competitors.

### Order History



### Customers that Need Attention

Greydata >

Sukix >

Curlygallon >

Giantjaguar >

Cekku >

**If the customers above were to leave...**



Profit Margin would increase by 5%

These customers have contributed to the loss of profits, re-negotiate terms with lower discounts or it may be beneficial to drop these customers altogether.



Sukix



Curlygallon



Giantjaguar



Cekku



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Q product

Q customer





Cancel

Search

Q |

Q customer

ACDF-18439

Product Description

AFGJ-28493

Product Description

GAKE-13952

Product Description

PFJR-74928

Product Description

DRTF-19434

Product Description

TGJD-48294

Product Description

PDYG-47294

Product Description



Cancel

Search

Q ACDF-18439

Q |

Amonghorse

Runsound

Jazzyturtle

Lotoo

Kuvso

Scarletcat

Sizu

Takot

Juzuha



Cancel

Search

Q ACDF-18439

Q Amonghorse



Price Lookup

**ACDF-18439**  
for **Amonghorse**

0 - 100 EA	\$5.60
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101 - 500 EA	\$5.55
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501 - 1000 EA	\$5.40
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1001 - 1250 EA	\$5.00
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1250+ EA	\$4.80
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0 - 100 EA

\$5.60

101 - 500 EA

\$5.55

501 - 1000 EA

\$5.40

1001 - 1250 EA

\$5.00

1250+ EA

\$4.80