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# ProTrac Memo

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## Business Analytics for both Operations and Accounting



In 2007 the economic world as we knew it, came crashing down. The downturn caused our customer base to lose a % of their sales. **The biggest hit was that there were no new customers.** New customers had always picked up the slack during a downturn in business now they simply did not exist. **Our customers had to rely on their current customers to make their sales numbers!**

**THE PROBLEM: What was the individual customer buying?**

**That information was locked away on their computer's DISK DRIVE!**

**How could they access the data in a timely fashion?**

**SOLUTION: Interface ProTrac with software that gave sales people access to each customer's sales activity –**

**WHILE THEY WERE ON PHONE OR ACROSS THE COUNTER!**

THAT IS HOW...

**Analytical Software (SWOT) became the future of ProTrac and  
Our Wholesale Distribution Customers**

There are two levels of the **Analytical Software** that PDSI has introduced to our customers.

1. When your sales person is talking to your customer - ProTrac's SWOT gives them **a snapshot of this customer's Buying Habits.**
2. The second level of ProTrac's Analytical Software – **SALES MATRIX** – **which gives MANAGEMENT the ability to analyze the buying habits of your entire customer list and the selling habits of your sales people.**

**Both software packages review a customer's**

<b>S</b>	<b>Strengths</b>	What products are they <b>currently buying</b> and how often?
<b>W</b>	<b>Weaknesses</b>	What products are they <b>no longer buying</b> ?
<b>O</b>	<b>Opportunities</b>	What products are <b>LIKE - customer's buying</b> ,
<b>T</b>	<b>Threats</b>	<b>Are sales to this customer and the margins from those sales, going south</b>

**No reports to run -  
It is live  
information.**

The first Analytical Package is our SWOT CRM for your Sales Reps

### SWOT CRM

#### 1. Customer Relationship Software

Program description – SWOT

Deployment – Cloud based accessed on line through a browser or mobile device

Target users – Inside sales people and outside sales people

Key benefits- ProTrac generated customer information that enables the sales person to SEE EACH CUSTOMER'S BUYING HABITS including

- Customer Strengths
- Weaknesses
- Opportunities
- Threats
- PDSI has added to the Power of SWOT - all of the CRM Features, which includes:
  - Reminders – allowing for follow up on key activities - by date and by the responsible person
  - Full history of activity within the last 6 months
  - Instant email and email storage
  - Document storage and retrieval from each customer

For a review of what ProTrac's SWOT CRM does, [click on this link](#) and watch a SWOT CRM U Tube

<http://www.pdsi.com/swot-analysis/>

### SALES MATRIX

The next Analytical Software is for the Manager who needs to review - How their Customers are buying, How Sales People are Selling, and what Inventory is being sold or not sold.

#### 2. Sales portfolio management system (Designed for Management)

Program description – Salesmatrix

Deployment – Client based on your network

Target users – CEO, CFO and Sales Managers

Key benefits

- Increase sales with existing customers
- Increase product sales
- Manage sales people's performance
- **Identify opportunities**
  - o Which of our Top Margined Products - **Does Our Top Customers**, Buy or Not Buy
  - o Show me all customers whose sales have **Increased OR Decreased** – this year versus last
  - o Show what products all **sales people sell** by **Product Line/Vendor** in detail and summary
  - o Market basket opportunities ( **show me everyone who has purchased our A-100**)

There are several U Tube videos on the many parts of Sales Matrix. Clicking on the Link below will take you directly to SalesMatrixUSA. We suggest starting with the Introduction to Sales Matrix and then moving out into areas that are important to you.

<https://www.youtube.com/playlist?list=UUx8GeTFO-gjU-xvAdphap3g>

### Global Financial Bridge

Analytics for your Income and Balance Statement

#### 3. Financial Performance Management

Program description – GFB (Global Financial Bridge)

Target users – CEO, CFO and sales managers

Financial statement analysis, What If and Budgeting Tool

Key benefits

- Know how effectively you are managing you're:

**Income statement, balance sheet and cash flow**

- Evaluate your business on 5 key focus areas
- Improve profit, cash and return on investment
- Manage you strategy as measured in your financial statements

Benefits

**Minimum of 5 % revenue growth over a 12 month period**

**Gross profit improvement of 1%-2% over 12 months**

Click on these U tube links for a complete explanation of Global Financial Bridge

<https://www.youtube.com/watch?v=FAJsvmO091E&feature=youtu.be>

Interview of a Global Financial User -Doug Meyer Cuno from Carolina Ingredients, it is a discussion about the company's use of Sales Matrix and Global Financial Bridge- 10 minutes long.

<https://www.youtube.com/watch?v=7OmgP4TBaqo>

This U Tube - by the Andre Gein, President of Sales Matrix and Global Financial Bridge, is 12 minutes long.

You have built your company on hard work and long days. With new technology, the next level in your company's growth may well come be done on the shoulders of ProTrac's Analytical Software. Large competitors have Vice Presidents who spend every waking minute gathering this information. Global Financial Bridge can have the same analytical information at your fingertips every day.

**WE WILL SET UP A WEBINAR JUST FOR YOU! IN 25 MINUTES WE CAN GIVE YOU A WALK THROUGH OUR ANALYTICAL LIBRARY!!**

**The most important thing to know about Analytics is - that it exists and ProTrac is ready to install it for you and your company. *Mel Carney***