

2014

# SWOT CRM Interfaced with ProTrac's ERP Software

Have you SWOT tested your customers today?

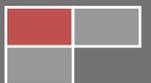
When the recession hit in 2008 wholesalers needed a way to sell more product to their current customers. Normal Reports took too long – Sales Reps needed to analyze a customer while they were on the phone or across the counter. They needed information on what a customer was buying, not buying, or if their sales were in decline IN REAL TIME.

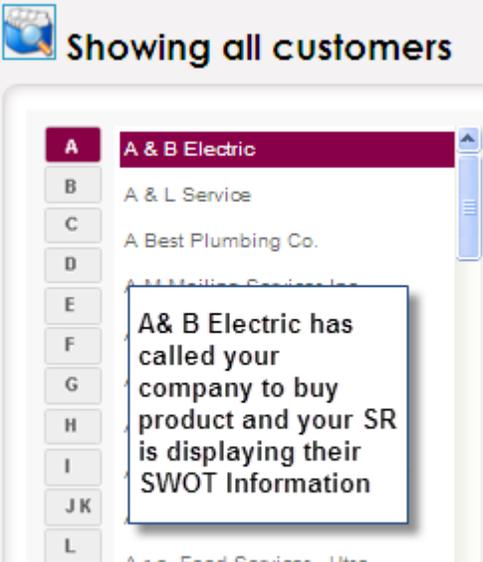
SWOT was developed and today distributors can SWOT TEST their customers at the counter, from a I PAD, I PHONE, ANDROID or their desk computer. Today our customers can SWOT test their customers and see their:

<b>S</b>	Strengths	What they are currently buying
<b>W</b>	Weaknesses	What they used to buy from them
<b>O</b>	Opportunity	What LIKE customers were buying
<b>T</b>	Threats	Are Sales and Margins headed south

800-711-7374

Mel Carney  
Professional Data Systems, Inc.  
1/1/2014



 <p>Showing all customers</p>	<p><b>-Strengths</b></p> <p><b>+ 10 products Purchased Regularly</b>  <b>Has a high margin percentage (31.95%)</b>  <b>Purchases on Average every 2 weeks from 10/7/2010 to 6/21/2012</b>  <b>Has purchased in the last 9 days</b>  <b>They are opening a new branch in San Antonio</b></p> <p>As soon as <b>A &amp; B Electric</b> is displayed <b>SWOT</b> shows the sales rep a summary of Purchases, their Margin %, how often they buy any product  <b>There is also a note about a new branch in San Antonio</b></p>	<p>S.W.O.T   Recent Activity   Graph   Contact   Add Notes</p> <p><b>- Strengths</b></p> <ul style="list-style-type: none"> <li>+ 10 products are purchased regularly.</li> <li>Purchases RTECFB-FC on average every 3 months.</li> <li>Purchases RTECHID on average every 2 months.</li> <li>Purchases RTECINC on average every 3 months.</li> <li>Purchases RTECPL on average every 2 months.</li> <li>Purchases CF14DD/E/746/ECO CMPCT FLRLMP on average every 3 months.</li> <li>Purchases CF31DT/E/IN/746/ECO FLUOR LMP on average every 5 months.</li> <li>Purchases MP200/C/U/MED HID LAMP on average every 3 months.</li> <li>Purchases MP70/U/MED HID LAMP on average every 2 months.</li> <li>Purchases RTECF30 on average every 2 months.</li> <li>Purchased MP200/U/MED HID LAMP on average every 7 weeks since 2/5/2011.</li> <li>Has a high margin percentage (31.63%).</li> <li>Purchases on average every 2 weeks from 10/7/2010 to 6/21/2012 and has purchased in the past 9 days.</li> </ul>
<p><b>Losing a customer and not knowing they are walking away is painful.</b>  <b>Edge is a buying group for electrical</b></p>	<p><b>- Weaknesses</b></p> <p><b>+ Has stopped buying 2 Products</b>  <b>Bought \$238.00 of Edge Products in the past 12 months (7.5% of the total)</b></p>	<p><b>- Weaknesses</b></p> <ul style="list-style-type: none"> <li>Has stopped buying - 2 Products</li> <li>Purchased F43CW/SS/ECO-(F30CW/SS/ECO) LM on average every 4 weeks from 3/16/2011 - 6/15/2011 , but has not purchased for the past 12 months.</li> <li>Purchased MP60/U/MED HID LAMP on average every 2 months from 2/5/2011 - 10/29/2011 , but has not purchased for the past 8 months.</li> <li>Bought \$238.00 of Edge products in the past 12 months.(7.51% of total.)</li> </ul>
<p><b>ProTrac has a field for keeping track of a type of customer.</b></p> <p>SWOT can search and find all products that <b>LIKE</b> customers are buying but <b>A&amp;B is not</b> buying</p>	<p><b>- Opportunities</b></p> <p><b>+ Similar Customers purchased the following products</b>  <b>Need to introduce new green range</b>  <b>Need to find out why they are not buying our cable</b>  <b>5/12/2012 present Eco-Range to them</b></p>	<p><b>- Opportunities</b></p> <p><b>Similar Customers Purchased</b>  <b>18 Like Cust Purch 4/3EMT Conduit 1101 times</b>  <b>15 Like Cust Purch 2/1 EMT Conduit 863 times</b>  <b>15 Like Cust Purch 912-5 4/3 2H EMT 492 times</b></p> <p><b>Need to Introduce Green Range to this customer</b>  <b>Need to find out why they are not buying cable</b>  <b>5/12/2012 Show new Eco-Range and make phone call</b></p>

The above information is just the first page, SWOT can also provide analysis of this customer's Purchases. Here we look to **Recent Activity**. That Activity can be broken down into **Revenue – Margins – Units** - all done without leaving Order Entry!

Products	Dec 11	Jan 12	Feb 12	Mar 12	May 12	Jun 12
46BR40/FL-210V LAMP					\$7.33	
80PAR10/HAL/NFL40-210V INCN LM	\$51.22					
9210B SMK DET 210V W/BATT		\$27.75				
CF14DD/E/746/ECO CMPCT FLRLMP				\$28.91		
CF14DT/E/IN/746/ECO FLUOR LAMP						\$62.21
CF31DT/FLUOR L					\$57.68	
FBO417/BENT FL						\$82.40
MP200/U					\$516.11	
MP70/U/M					\$36.50	
RTECF30						\$12.60
RTECFB-FC				\$4.20		\$4.20
RTECHARDSHELLINC				\$1.38		
RTECHID				\$63.02		\$45.79
RTECINC						\$1.68

How is A & B Electric buying from us in the past few months?

The SR wants to see revenue dollars

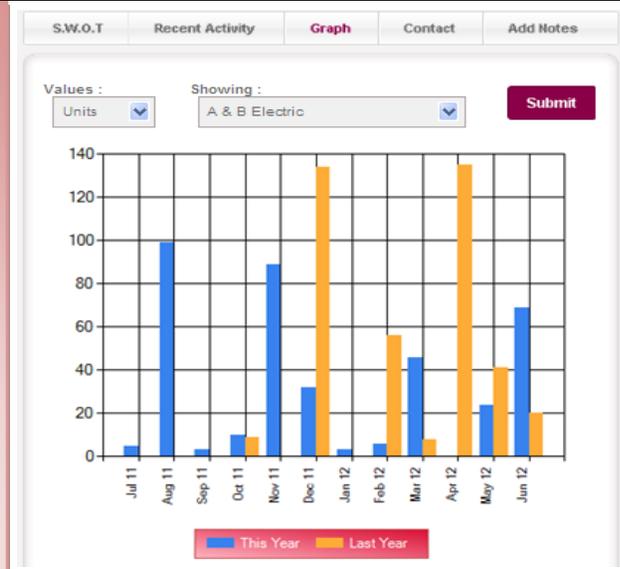
Then the SR wants to know how much cabling has fallen off in the past few months

Cabling Sales have begun to fall away

Products	Dec 11	Jan 12	Feb 12	Mar 12	May 12	Jun 12
Cable	\$950.58	\$27.75	\$227.76	\$105.75	\$617.59	\$82.40
<b>Grand Total</b>	<b>\$950.58</b>	<b>\$27.75</b>	<b>\$227.76</b>	<b>\$180.08</b>	<b>\$617.59</b>	<b>\$211.77</b>

This information is coming out of the last 30 months of invoices for A&B Electric. Using SWOT the SR saw a trend that this customer is no longer buying cable from them – While the customer is on the phone the SR can run this analysis of the A&B account

The SR wants to see how this customer unit buys are stacking up against Last years. The same graph can be run by revenue and margins.



**FOR U TUBE DEMONSTRATION OF SWOT**  
<http://www.youtube.com/watch?v=uoYN21XzugM>

**ANALYSIS IS NOT JUST FOR ACCOUNTANTS – ANYMORE**  
 ProTrac and SWOT give fast analysis to your sales team. They can use the tool to help a customer buy more of your products.

SWOT is like having a competition alert that is always on and always looking for ways to move more of your products to your customers

**Contact Mel Carney for a demonstration of ProTrac, SWOT CRM**  
**800-7111-7374**

# THEN WE ADD A FULL CUSTOMER RELATIONS MANAGER TO SWOT AND SWOT CRM IS READY FOR INSTALL

User: demo@customerswot.com  
6 Reminders (3 Overdue)

Showing all customers and Prospects

Options

S.W.O.T Recent Sales Graph Contacts Customer Notes

A A & B Electric  
B A & L Service  
C A & R Services  
D A Best Plumbing Co.  
E A M Mailing Services Inc  
F A&r Plumbing Services  
G

When the SWOT screen appears we see that there some reminders and 3 are overdue

Options

Reminders for: demo@customerswot.com Include Completed ?

Due Date	Customer	Action	Reminder	Complete	Edit
01/21/2014	A Best Plumbing Co.	Phone	Purchased 1621W 210V BB HEATER on average every 5 weeks	<input checked="" type="checkbox"/>	
01/22/2014	Abbott Construction	Pricing	** WARNING ** Margin is negative.	<input type="checkbox"/>	
01/28/2014	A & B Electric	Meeting	1/22/2014 15:04 PM must see new low energy range Meeting Details:	<input checked="" type="checkbox"/>	
01/30/2014	Oriental School Of Astrology	Pricing	In the top 15 percent of Customers by revenue, but lost \$-1361.76 in	<input checked="" type="checkbox"/>	
01/30/2014	A & B Electric	Meeting	Margin grew this past 12 months from \$977.95 to \$1520.75, a	<input type="checkbox"/>	
02/03/2014	A & B Electric	Phone	10 similar customers purchased FO41732/ECO RS OCTRON FLR	<input type="checkbox"/>	
02/11/2014	A & B Electric	Phone	Must visit their showroom to see if we can put a cable display there	<input type="checkbox"/>	
02/12/2014	Abbott Construction	Visit	We need to discuss a new quote for upcoming job in Houston	<input type="checkbox"/>	
02/14/2014	A Best Plumbing Co.	Meeting	Purchased TA2AW 11A SP THERM SECT on average every 4	<input type="checkbox"/>	
02/28/2014	Abbott Construction	Pricing	** WARNING ** Margin is negative.	<input checked="" type="checkbox"/>	

Contacts

A Alan Powell  
B Albert Cost  
C Allan  
D An  
E An  
F An  
G An  
H An  
I Andrew Monray

Connected To	Type	Title/Dept
GreyWay Engineering	Default Contact	
Janet Marshall	Family Member	
Texas Professional Engineers	Member	

Add Connection

Alan Powell is \* Family Member

With SWOT CRM - You have all of your customer contacts with you on the Cloud along with others to whom they are connected

We feel that SWOT CRM was done right, right from the beginning. They started with SWOT which gives the customer the ability to analyze a customer from where ever they are on almost any smart device. They have added the Cloud for looking up product from remote locations and with CRM they are rounding out a product that will be the leader in CRM products in the coming years. As a vendor we investigated 15 different CRM packages before selecting SWOT CRM because we believe that they offer our customers the best software to do all of their analysis of their customers. *Mel Carney*

Showing all customers and Prospects

S.W.O.T Recent Activity Sales Graph Contacts Customer Note

**A** A & B Electric  
**B** A & L Service  
**C** A & R Services  
**D** A Best Plumbing Co.  
**E** A M Mailing Services Inc

This is the Note Section and where meetings can be set and emails can be sent

Note  
 A&B are really pushing to get onto an approved vendor for the new University building program. I think that we should meet with them and offer any assistance that we can offer!

Note Strengths Weakness Opportunity Threats

Quick Notes

Phone Meeting Info Required  
 Visit Mail Order

Delete Delete All Cancel Save

Add Reminder

Due Date: Click here to Select date Action: --Select--  
 Reminder for: demo@customerswc Location: --Select--  
 Cancel Save

Q R Ab Electric - Madison Property  
 S Abbott Construction  
 T ABC Electric - 14 Tal St  
 U V ABC Electric - 2310 Crossroads  
 W ABC Electric - Allen Kitchen  
 X Y ABC Electric - Camb Piggly Wig  
 Z#

From...  
 To... Sally@balelectric.com  
 Cc...  
 Bcc...  
 Subject: Purchasing Insights from ProTrac

Your Sales Rep in the field has seen something on the SWOT screen that needs to be addressed with the customer straight away. Instead of waiting until getting back to the office this email can be selected and sent from the I PAD, I PHONE or Android from the field.

Sally  
 In our endeavor to serve you better we have reviewed your recent purchasing pattern reflecting products that your company purchases from ProTrac.

Description	Details	How can we Serve You
Products purchased frequently	<ul style="list-style-type: none"> <li>MP200/U/MED HID LAMP (Every 7 weeks)</li> <li>MP70/U/MED HID LAMP (Every 2 months)</li> <li>RTECF30 (Every 2 months)</li> <li>RTECHID (Every 2 months)</li> <li>RTECPL (Every 2 months)</li> </ul>	Please contact us if we can be of further service to you
Products that similar companies are purchasing from ProTrac	<ul style="list-style-type: none"> <li>2/1-EMT CONDUIT01</li> <li>4/3-EMT CONDUIT</li> <li>912-S 4/3 2H 5TL EMT STRAP</li> <li>FO41/732/ECO RS OCTRON FLR LMP</li> <li>THHN-21-WHT-29STR-CU-6005/R</li> </ul>	We have these products on our shelves waiting for you to give us the opportunity to further serve you and your company

Mel Carney 800-711-7374

Figure 1 Email from the field to a customer

How much power do you want your sales people to carry with them when they head out to make sales calls?

# SWOT CRM - ProTrac

Lets you give them the power that they need

Without - breaking the bank

For Information Contact **Mel Carney at PDSI**