SALES AND SERVICE PIVOT

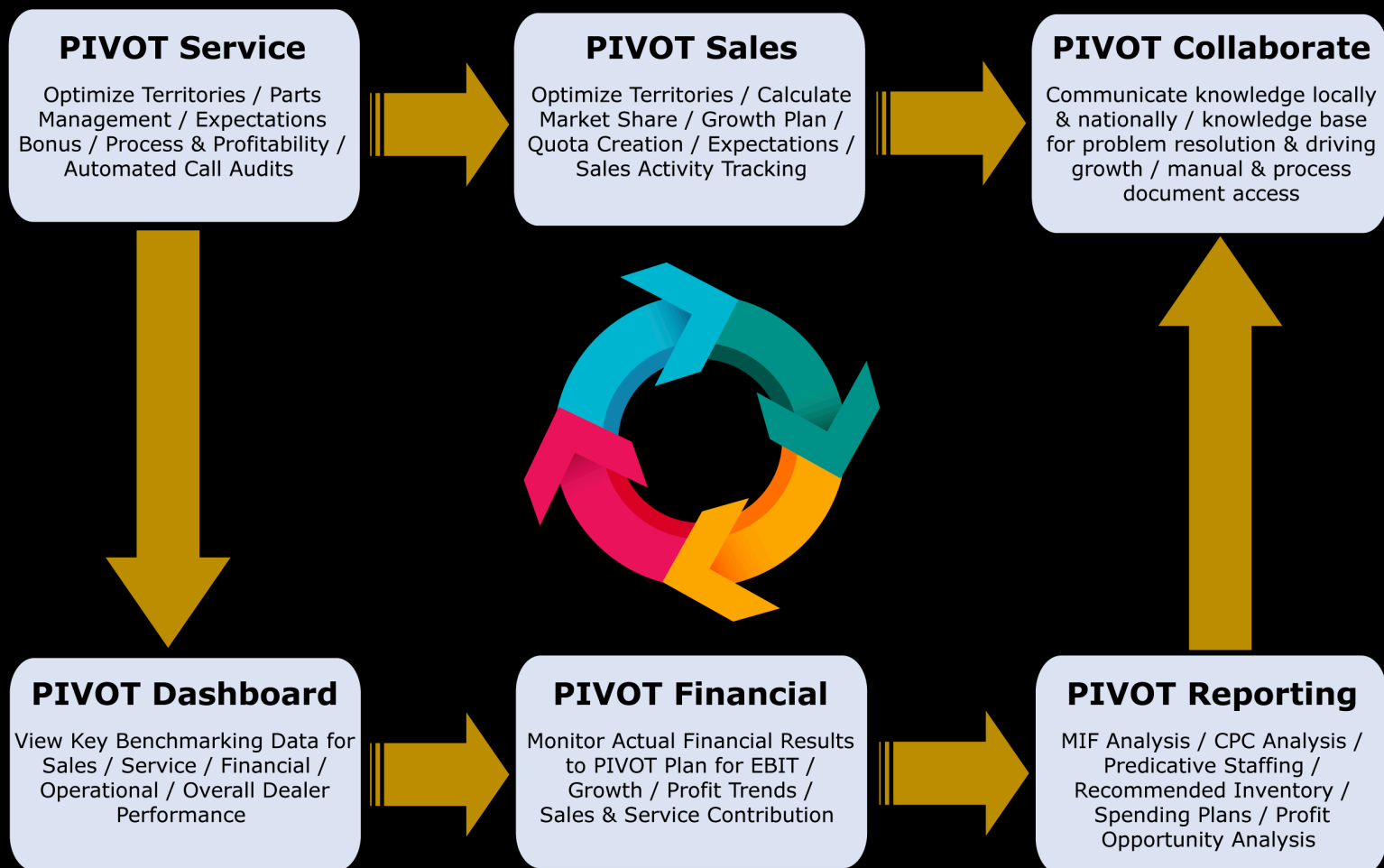*"Performance Improvement Virtual Operations Tool"*

Business Analytics Platform
Maximizing Results through Relevant Data

The Pros Elite Group is excited to announce the delivery of the first integrated Sales and Service combined Business Analytics Performance Enhancement platform. The work flow diagram below, outlines some of the capabilities associated to this innovative BA Platform.

Sales and Service Managers today are looking for an effective tool to assist them in the Management of their employees to specific goals to achieve revenue growth, maximize productivity, improve profitability and achieve high levels of customer service. Accurate Territory development for both Sales and Service is imperative for Elite performance, high profitability and continued growth!

After 4 years of extensive development, over 50 companies BETA testing, and feedback from hundreds of Managers and Presidents, The Pros Elite Group is prepared to deliver "Cutting Edge Technology" into the hands of the Office Imaging Industry!

PIVOT Service
Optimize Territories / Parts Management / Expectations Bonus / Process & Profitability / Automated Call Audits

PIVOT Sales
Optimize Territories / Calculate Market Share / Growth Plan / Quota Creation / Expectations / Sales Activity Tracking

PIVOT Collaborate
Communicate knowledge locally & nationally / knowledge base for problem resolution & driving growth / manual & process document access

PIVOT Dashboard
View Key Benchmarking Data for Sales / Service / Financial / Operational / Overall Dealer Performance

PIVOT Financial
Monitor Actual Financial Results to PIVOT Plan for EBIT / Growth / Profit Trends / Sales & Service Contribution

PIVOT Reporting
MIF Analysis / CPC Analysis / Predicative Staffing / Recommended Inventory / Spending Plans / Profit Opportunity Analysis

PROS ELITE GROUP
The Profitability Improvement Specialists

PIVOT Service Overview

PIVOT Service Territory Development

Data Import / Validation
PIVOT ensures accurate data is loaded into the Service mapping tool by correctly segmenting your devices, identifying and correcting any meter rolls / missing meters, identifying your active devices being serviced and removing your inactive devices from your data.

Balancing Territory Workload
PIVOT uses advanced algorithms to help the dealer accurately create a balanced territory workload with high territory integrity. A dealer must be able to keep a technician in their territory 80% or greater of the time to generate meaningful technician performance expectations and create highly accurate inventories.

Pros Elite Expert Guidance & Support
Many dealers have legitimate questions when developing territories. Should I specialize my workforce? What is the best service structure for my organization? What process should I follow to generate effective territories? The Pros Elite Executive team has helped hundreds of companies create territories for their Service Organization and will guide you through the process to ensure you achieve the desired results.

PIVOT Technician Spending Plan Development

Create relevant spending plans that are based on the territories assigned to each technician
Many service organizations have not identified how much money they should be spending each month on parts to support their existing devices in the field. PIVOT Analytics will accurately determine the spending target for your Service Organization, each team manager and every service technician based on the dealer's current monthly revenue.

PIVOT Technician Car Stock Development

Predictive Parts Usage
PIVOT's predictive parts usage analytics model has proprietary algorithms that are highly accurate and will effectively determine the parts that each technician should stock to support their territory. This puts each technician in the position to achieve benchmark performance in their incomplete rate.

PIVOT Technician Performance Expectations

PIVOT Calculated Territory Specific Expectations
PIVOT's advanced analytics platform will evaluate the model/mix of devices, average monthly volume, and geographic size of each territory to determine what specific performance expectations each technician should achieve.

Field Manager Team Expectations
Based on the techs that are assigned to a field manager, PIVOT will calculate the team performance expectations that each field manager is expected to achieve.

Realistic Performance Expectations
Managers no longer need to use their gut feel to determine performance expectations for each technician. PIVOT identifies the performance expectations through accurate analytics and the manager can set a realistic improvement plan that moves each technician towards achieving their territory performance expectations in attainable time frames that are customized to the territory each technician is supporting.

PIVOT Technician Bonus Program

Self-Funded Bonus Program
A big challenge many dealerships have is their bonus program becomes an entitlement program. Dealers often find themselves paying out thousands of dollars each month in tech bonus without realizing improvement in their service profitability. The PIVOT bonus plan solves this issue. The dealer has the option to enable a financial qualifier that is connected to the technician bonus program. This will reduce bonus payout if there is any manipulation of the operational data being input into dispatch and increase the bonus payout if the techs are following the correct process and driving real improvements in service.

Customize your Bonus Plan
Each dealer can customize the components of the PIVOT bonus program to provide greater payout potential on the processes that you are currently focused on in your service organization.

Bonus Based on each Techs Ability to Achieve their Expectations
The PIVOT bonus program is calculated based on the performance improvement expectations that the manager sets with each technician. This eliminates high volume techs that manage more copies getting large bonus payouts and low volume techs that manage less copies getting lower bonus payouts. The PIVOT bonus plan is relevant to the territory the technician supports.

PIVOT Sales Overview

PIVOT Sales Territory Development

Territory Design
- Ability to identify current base, current dealer market share and location of all current placements.
- Sales Territory Assignments and Definitions (ie. Retail Account Rep, Major Account Rep, etc.) can be customized by the dealer.

Sales Rep Quota Generation
- Driven by Pro's Proprietary Document Production Index (DPI)"
- Accurately identify net new dollar opportunity in each territory.
- Quotas customized by actual territory market share penetration.

Equipment Sales Market Share Analysis & Revenue Growth Plan
- PIVOT recommends dealer equipment growth plan which can be adjusted based on dealer's appetite for growth.
- PIVOT will adjust sales quotas to achieve dealer's equipment growth plan.
- PIVOT performs a company and territory market share analysis.

PIVOT Sales Activity Results Tracking

Collecting Relevant Data to Achieve Equipment Growth Plan
- Dealer now can see actual $ value of the Equipment Pipeline updated Daily.
- Move Forward Appointment activity reported Daily.
- MFP / MPS / MNS Opportunities identified on a Daily basis.
- Stack Ranking of Sales Professionals in each critical performance activity.
- Actionable Steps provided to enhance the performance of lower stack ranked Sales Professionals.

PIVOT Performance Standard Settings

Create Accurate Quarterly Performance Sales Expectations
- Track Rep performance against activity plan.
- Update Net New Business Goals.
- Adjust quota based on Market share achievement.
- Improve forecasting and pipeline/funnel accuracy.
- Drive top performers to record levels of performance.

PIVOT Sales Performance Report

Measure Actual to Planned Performance with Corrective Execution Steps Provided by PIVOT
- Track quarterly equipment revenue and equipment gross profit trends.
- Compensation comparisons to benchmarks for revenue and gross profit.
- Focuses on Net New Business Penetration
- Review all other Selling expenses on a quarterly basis.
- Analysis Sales department profit contribution.
- PIVOT recommends specific steps to take in order to improve areas of opportunity.

PIVOT Collaborate

Two Heads are Better Than One

- Transfer knowledge & create problem resolutions through the power of PIVOT's proprietary collaboration/communications platform.
- Internal private communications & knowledge sharing within your company employees.
- External Private and Public Communications & Knowledge Sharing with your Peers on a National / International Leve.
- PIVOT stores all Problem Resolutions in our Knowledge Base to ensure Timely & Searchable Resolutions to Issues you are Experiencing in Conducting your Daily Job Responsibilities.
- Share Innovative Ideas with your Peers to Drive Growth, Customer Responsiveness and Improve your Company Profitability.
- Storage of Critical Documents needed to Execute your Job Successfully (service manuals, technical bulletins, Work Flow Processes, etc.)

PIVOT Dashboard

PIVOT Performance Dashboard

Measure Actual Versus PIVOT Generated Planned Results

- View Key Sales, Service, & Admin Financial/Operational Benchmarking Data Defined to the Industry Model.
- View MTD and Historical Actual Performance Trends against your PIVOT Generated Planned Performance.
- Receive Notifications when your Actual Results are trending Outside of Acceptable Performance Levels.
- Drill Down to the Employee Level to Determine where your Focus should be to Improve an Opportunity Area Identified by PIVOT.
- PIVOT will Recommend the Critical Areas within your Business that you Need to Monitor.
- PIVOT Identifies your Opportunities and Removes the Need to Analyze Endless Reports so you can spend your Valuable Time Driving Business Results.

PIVOT Financial

PIVOT Links To Your Financials

- PIVOT is the only tool that uses your financial information in Service, Sales and Administration to generate the analytics that will keep your business on course.
- PIVOT uses the Industry benchmarking model general ledger of accounts to map your financials in Service, Sales and Administration to the only accepted definition of financial accuracy.
- PIVOT recommends actionable steps in critical financial areas that most affect the achievement of benchmarked EBIT.

PIVOT Delivers a Total Financial Operations Review

- PIVOT trends concise Consolidated and functional P&L performance monthly and quarterly to focus management on critical performance indices.
- PIVOT trends critical Asset Management criteria in inventory and receivables to ensure that EBIT achievement results in healthy cash flow.
- Over or underachievement in critical areas of Revenue, COGS, Expense or Asset Management are clearly identified for action.

PIVOT Plans For Growth

- PIVOT's market share analytics help you plan focused growth by territory opportunity.
- PIVOT's equipment pricing analytics identify the equipment value of your renewable base.
- After market revenue and gross profit trends are clearly defined and become the basis for planned aftermarket revenue and GP growth.
- Acquired and Organic growth can be identified to insure acquisition activity delivers optimal ROI.

PIVOT Focuses To Actual Organization Profit Contribution

- PIVOT clearly defines actual benchmarked Service Gross profit contribution and identifies the specific areas and individuals most responsible for achievement and those areas and individuals with the most opportunity to improve.
- PIVOT clearly defines benchmarked Sales performance in Gross profit, Sales compensation and All other sales expense and identifies the specific areas and individuals most responsible for achievement and those areas and individuals with the most opportunity to improve.
- PIVOT defines actionable steps to maintain or improve l profitability in all functional areas.

PIVOT Reporting

PIVOT Sales & Service Reporting

PIVOT Service Performance Report
- Complete financial and service operational results in one detailed report (to include financial and operational trending, stack ranking of all service employees in the 9 key operational metrics)
- Identify opportunity areas that need improvement and the specific actions to execute to resolve underperforming techs and service teams.
- Stack rank technicians in key performance categories. Identify your top 1/3, middle 1/3 and bottom 1/3 of performers to focus your improvements initiatives on the people that need the help.

M.I.F & Territory Analysis Reporting
Upon importing accurate territory data our advanced reporting capability allows a Service Executive to review the following:
- Workload analysis utilizing proven strategies for territory development
- Population by Manufacturer
- Population by Segment
- Population by Model
- Population by Zip Code & AMV
- Total MIF AMV, Total BW & Color Copies

Car Stock/Inventory "Main Warehouse" Reporting
An accurate car stock for technicians is imperative to achieve an 8% benchmark level for incomplete rates.
- PIVOT's advanced analytics uses a "Predictive Usage" model to calculate car stocks.
- Min and Max Recommendation levels set for each part.
- Control write-offs of Obsolete Parts
- Have the parts needed 92% or greater of the time on the first tech visit.
- Carrying the correct parts often reduces the Total $ Value of each Tech's Car Stock.

Parts "Spending Plan" Development
PIVOT spending plan analytics takes parts expense to a new level of enhanced reliability and cost control.
- PIVOT calculates Spending Plans at the Team and the Individual Technician level.
- Accurate Spending Plans are key to creating the awareness needed to attain benchmark parts expense control without negatively impacting the reliability of the equipment.
- PIVOT uses the model mix of machines & volumes generated from each device in order to develop a very accurate territory based spending plan for each technician.

PIVOT Sales Reporting
- Sales performance report to key Financial & Operational Benchmarks.
- PIVOT recommended structure/staffing for sales managers & sales reps.
- PIVOT generated market share analysis.
- PIVOT generated territory market share analysis.
- PIVOT generated 12-month equipment revenue growth plan.
- PIVOT generated territory sales quotas with 12-month growth plan factored into the quota
- PIVOT will calculate the net new and existing MIF portions of the monthly sales quota.

PIVOT Opportunity Analysis Reporting
Managers are challenged to find an easy way to determine manpower requirements.
- PIVOT proprietary analytics model will show the workload impact of driving field operational performance closer to benchmark.
- PIVOT will monetize the impact of your Service Department's operational improvements.
- PIVOT determines the amount of Net New Copies your Service Team can absorb as your operational results improve.

Predictive Hiring and Staffing Report
Imagine…the ability to know exactly when manpower should be increased based on the changes financially and operationally within your company.
- Use PIVOT to hire & onboard experienced or entry-level technicians well in advance of needed manpower requirements.
- Eliminate early or premature hiring which is a key contributor to negatively impacting profitability in service organizations.

CPC Analysis
- Generate CPC at the Manufacturer, Segment and Model level.
- Labor CPC based on Industry Average Burden Rate or the Dealers Actual Labor Cost.
- Price a Deal using PIVOT's "Proposal Pricing" tool
- Calculate your CPC based on the "Expected AMV" of the device.

Meet Our Expert Team

Jerry Newberry

President and Managing Partner

Jerry brings over 32 years of industry experience, including 10 years with Global Imaging Systems as a corporate officer and Vice President of Service. During Jerry's time with Global he was responsible for working with all global locations to achieve service operational benchmarks and a 52% company wide service GP. Prior to his career with Global Imaging, Jerry spent 10 years at Xerox Corporation and was a VP of service in the independent dealer environment.

Jeffrey Kelly

Senior Partner

Jeff has more than 28 years of experience in the office products industry. He has worked with Xerox Corporation, as an industry service consultant, and as a Director of Service within the independent dealer environment. While working at Xerox Corporate headquarters, Jeff was responsible for going into service branches and implementing processes and systems to ensure maximum margins and field performance. Jeff's area of expertise is maximizing service operational efficiencies and profitability using proven systems.

Stephen J. Rolla

Senior Partner

Steve has been in the Office Imaging Industry for 48 years and is one of the few Company Presidents in the Industry who have come from a Service background. Most of the industry knows of Steve as the President of organizations that have achieved Ikon's CEO of the Year award, or the Global Imaging Systems Chairman's award. He also brings 15 years of experience as the Vice President of Service and Operations for the largest independent dealer the industry has ever known, A-Copy where he managed a powerful organization with over 25,000 customers and 250 Service personnel.

Andy Peacock

Service Performance Optimization Consultant

During Andy's 28 years in the office products industry, he has held most every service position the industry has to offer. The last 12 years with a Global Imaging/Xerox company as the Vice President of Service. Andy was responsibility for 6 offices and a staff of 85 employees providing service and support for over 10,000 clients across Alabama and portions of Florida, Georgia, Tennessee and Mississippi. While Vice President of Service, Andy saw great success developing his management staff and implementing operational processes making his dealership one of the most profitable service organization's in Global Imaging Systems.

SALES AND SERVICE

PIVOT

"Performance Improvement Virtual Operations Tool"

PLEASE CONTACT THE PROS ELITE EXECUTIVE TEAM FOR DETAILED INFORMATION AND TO SCHEDULE A DEMO

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