



# Tibersoft User Group

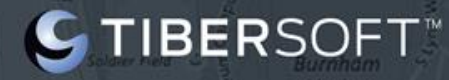
## Day 2





# Explore Roadmap

PRESENTED BY CHRIS HART



# My DB Team





# My App Team



# Lanes of the Roadmap



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**Explore** Software

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**Existing** Modules

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**New** Modules

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**Longer Terms** Services

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# Next for Explore

A grey rectangular frame representing a software interface. In the top-left corner is a green square icon with a white compass needle. In the top-right corner is a row of 12 small, light-grey squares. Below these are four empty rectangular boxes. The main area contains a white rounded rectangle with a list of four bullet points. A blue callout box with a white border points to the 'Offline' item.

- More Speed
- Offline
- Training Center
- User experience, fit and finish

Poll Result: Offline and Video training important

# Next for Operator Purchases



A software interface mockup with a grey header bar. On the left is a green square icon with a white compass. On the right is a row of 12 small white squares. Below the header is a white tab labeled "OPERATOR PURCHASES". The main content area is a white rectangle containing a bulleted list.

- Sales Dollars
- 2<sup>nd</sup> Sales Hierarchy for Operators
- Budget
- CRM Account Numbers

# Next for Audit

A screenshot of a software interface. The top bar is grey and contains a green square icon with a white compass needle. To the right of the icon are several small, empty square checkboxes. Below the top bar is a white tab labeled 'AUDIT'. The main content area is a white box with a grey border, containing a bulleted list of items.

- Membership List Overlap
- Not a Member
- View Any Claim and also show Proposed Payable information
- Inheritance of Approval Decisions



# Next for Growth








A software interface mockup with a grey header bar. On the left is a green square icon with a white compass needle. To its right is a row of ten small, light-grey squares. Below the header is a white tab labeled 'GROWTH'. The main content area is white and contains two columns of bulleted text.

- Segment/Category packages
- Predictive Items Suggestions
- OpLIFT
- Location Counts
- On-Contract Items
- In-Distribution Items
- Org Levels, OpX actual number

# New Tabs

Poll Result:  
*Put focus on new Tabs?* Strong interest for new Tabs.  
Desire for Defend and Profitability stronger than Report Up and Equipment.



	<b>Sources</b>	Exception based data availability tracking
	<b>Defend</b>	Focus on existing business where category growth is at risk
	<b>Report Up</b>	Track savings in Audit, Campaign and other modules. Summarize ROI
	<b>Profitability</b>	Blend Sales, Operator Purchases, Operator Trade and Distributor Trade for Location level profitability analysis
	<b>Equipment Tracking</b>	Tag locations with equipment and track that appropriate items are being utilized



# The Next 6 -18 Months

OpTRADE: Decision to Ordering Mastering

Sales Force Comp Calculator

OpTRADE API

Visualization – Heat Maps for Growth, KPIs for Campaigns and Audit

Mobile – Deliver key account data to a mobile app

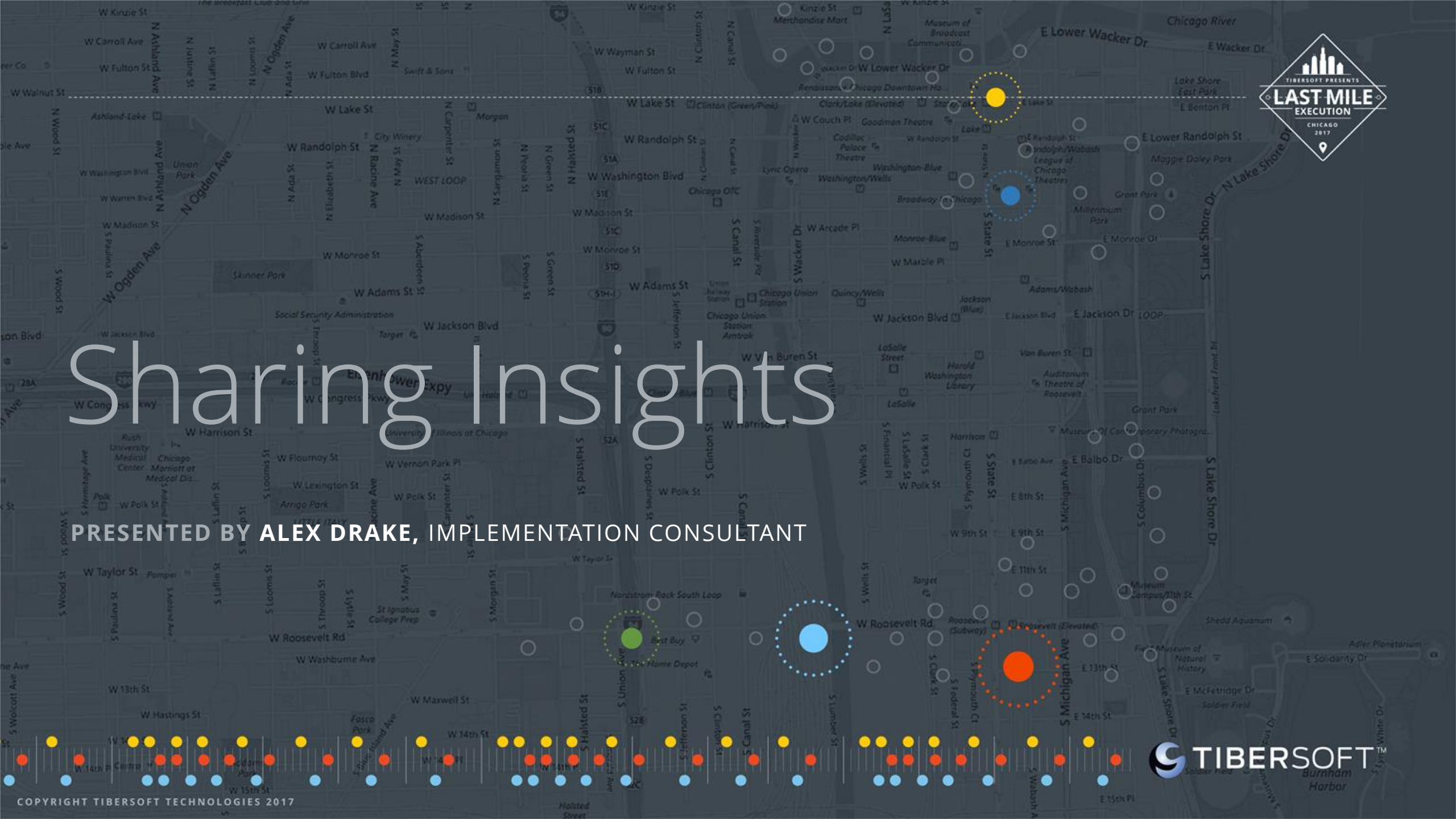
Extra Poll Result: *Want daily updates?*  
Some now, nearly all eventually.





# Sharing Insights

PRESENTED BY ALEX DRAKE, IMPLEMENTATION CONSULTANT



# What's New

- Share. Save and send a quick view to another user. View remains static until changed by other user.
- Publish. Broadcast Scenarios managed by a Super User. If the creator changes the view, it changes for everyone.
- User Groups. Create groups of users to make sharing and publishing to large groups easier.



New Folder

Share














Publish

Refresh

Rename

Delete

Close

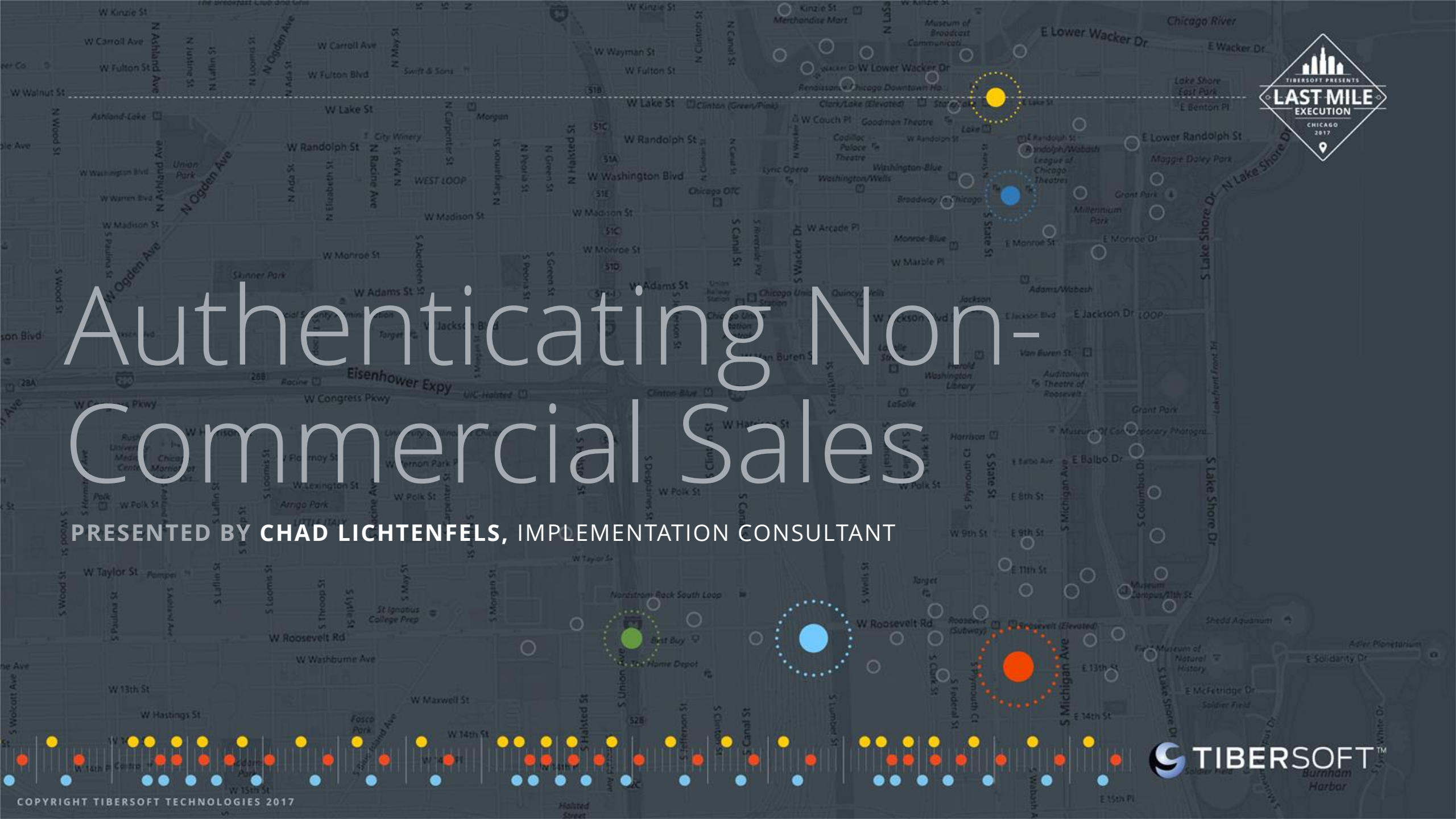
SCENARIO		TYPE	USER NAME
 AutoSave	<input type="checkbox"/>		
 My healthcare skus	<input type="checkbox"/>		<b>Brokers</b>
 Perkins penetrations	<input type="checkbox"/>		<b>Commercial Gr...</b>
 Unipro Product Void Ma	<input type="checkbox"/>		<b>Field Sales</b>
	<input type="checkbox"/>		<b>Finance</b>
	<input type="checkbox"/>		<b>Non-Comm Gro...</b>
	<input type="checkbox"/>		<b>Sales Leaders</b>
	<input type="checkbox"/>		Beth Madore
	<input type="checkbox"/>		Chad Lichtenfels
	<input type="checkbox"/>		Christopher Martin

Empty panel



# Authenticating Non-Commercial Sales

PRESENTED BY CHAD LICHTENFELS, IMPLEMENTATION CONSULTANT



# Agenda

- Two Key Themes:
  - Measurement
  - Campaign Process
- Technomic Insights
- Authenticated Sales
- Sales Opportunity Types
- OpTRADE Share
- ADEM (Analyze, Develop, Execute, Measure)
- Campaign Module Run Book

# Technomic Industry Insights

- Penetration of GPOs is continuing
- Most major noncommercial segments (not only healthcare, but colleges, B&I, etc.) are heavily driven by contract pricing
- Distributors and manufacturers have less leverage as chains and group purchasing organizations become power buyers
- GPOs have taken their negotiated prices meant for certain customers and have extended them into adjacent operator segments
- The nature of the operator sales call, particularly for manufacturers, changes to one where they are not truly selling their products or solutions, but working to ensure compliance with a contract
- Construct proper guardrails to ensure that higher margin business remains profitable
- Realize that sales force realignment may be necessary-Omni Channel Sales

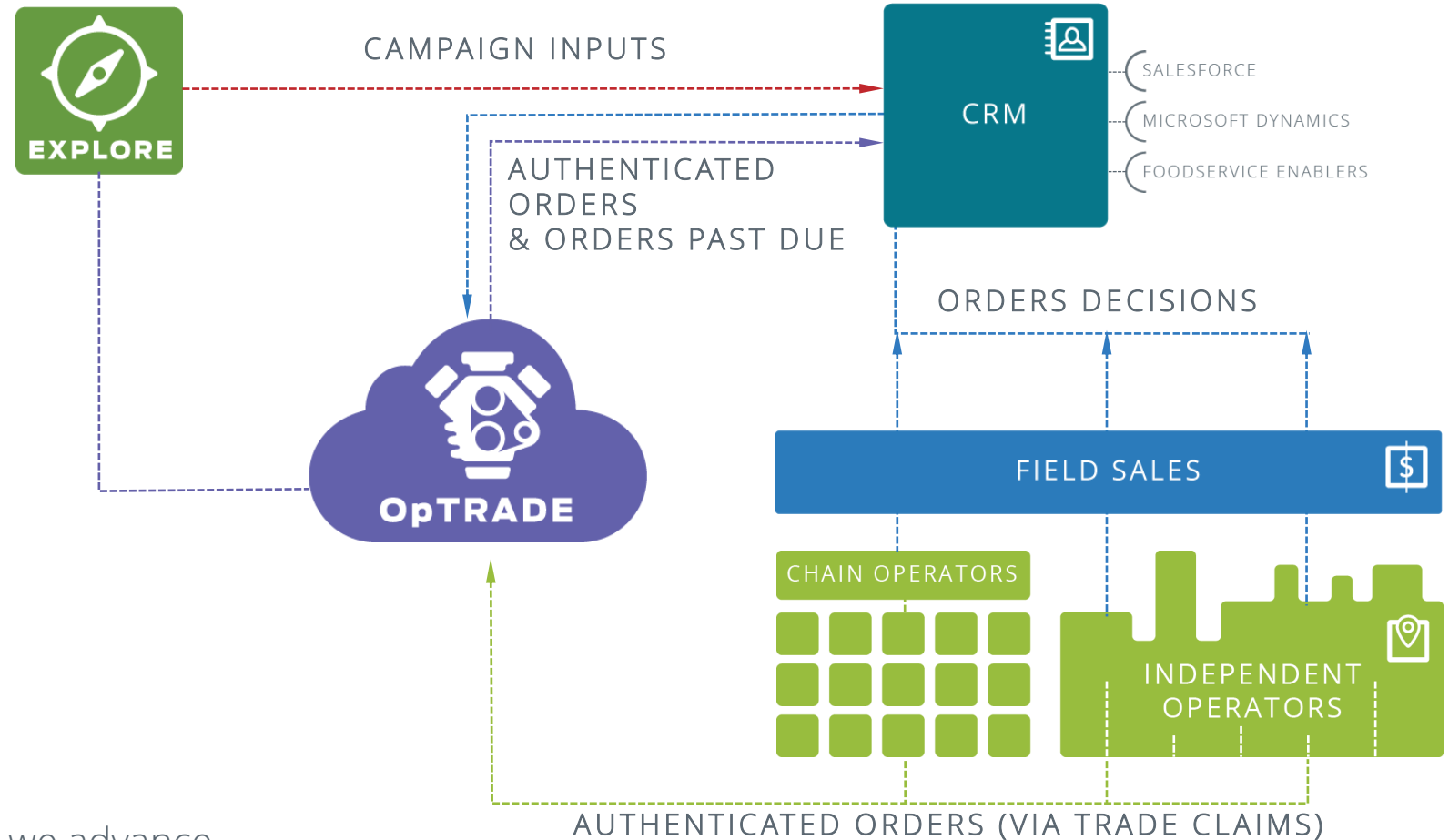


# Order Authentication

Authenticating order volume helps uncover channel snags and lift sales.

Tibersoft masters CRM  
Order Decision  
Locations to OpTRADE  
Order Locations found  
within trade claims.

The loss rate on new  
operator orders is up  
to 90%.



## Key Concept

Important to understand before we advance





# CRM System

pipedrive

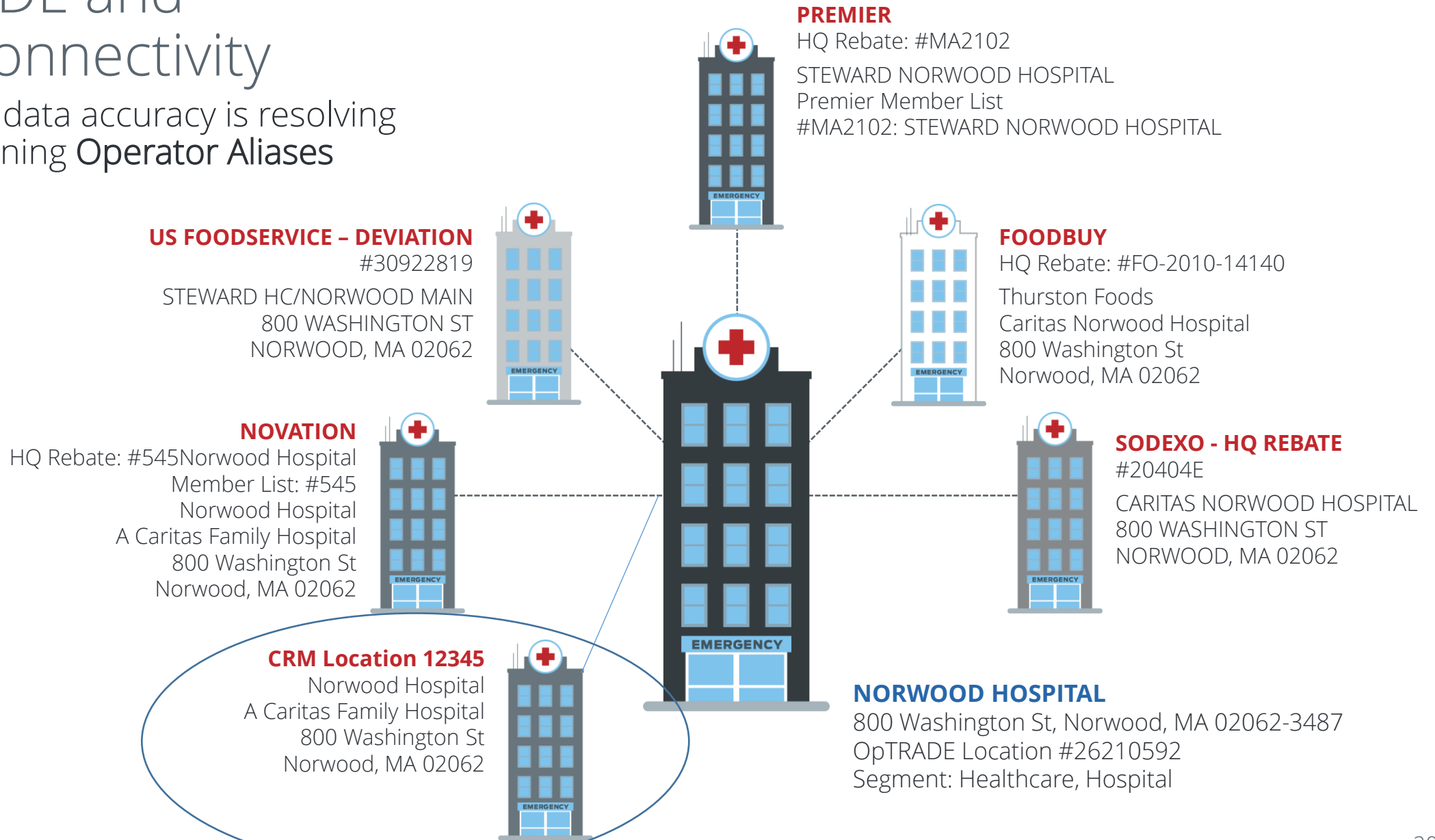
Deals
Mail
Activities <sup>14</sup>
Contacts
Products
Statistics
?
🔔
Chad Lichtenfels Tyson

☰
☰
🔄
Add deal
\$304,350 · 15 deals
⚙️ Pipeline settings
☰ Chad Lichtenfels

Develop \$49,000 4 deals	Contact \$66,500 3 deals	Offer \$114,125 5 deals	Order Decision \$58,625 2 deals	Authenticate \$16,100 1 deal
<p>👤 Premier Sausage-Fairacres Manor deal <span>➡️</span> \$15,750 Fairacres Manor</p> <p>👤 Abbey Delray South deal <span>➡️</span> \$3,500 Abbey Delray South</p> <p>👤 Premier Sausage-Abingdon Health &amp; Rehabilitation deal <span>➡️</span> \$10,500 Abingdon Health &amp; Rehabilitation</p> <p>👤 Premier Sausage-Baldock Health Care Center deal <span>➡️</span> \$19,250 Baldock Health Care Center</p>	<p>👤 Premier Sausage-Jasper General Hospital deal <span>➡️</span> \$26,250 Jasper General Hospital</p> <p>👤 Ham Compliance-Acadia Healthcare-The Village deal <span>➡️</span> \$17,500 Acadia Healthcare-The Village</p> <p>👤 Ham Compliance-Kenosha Medical Center Campus deal <span>➡️</span> \$22,750 Kenosha Medical Center Campus</p>	<p>👤 Ham Compliance-Palestine Regional Medical Center <span>➡️</span> \$27,625 Palestine Regional Medical Center</p> <p>👤 Premier Sausage-Tanner Health System deal <span>➡️</span> \$21,000 Tanner Health System</p> <p>👤 Premier Sausage-Abingdon Manor deal <span>➡️</span> \$12,250 Abingdon Manor</p> <p>👤 Premier Sausage-Adams Nursing Home deal <span>➡️</span> \$17,500 Adams Nursing Home</p> <p>👤 Ham Compliance-Redmond Regional Medical Cente deal <span>➡️</span> \$35,750 Redmond Regional Medical Cente</p>	<p>👤 Premier Sausage-Community First Medical Center deal <span>➡️</span> \$28,000 Community First Medical Center</p> <p>👤 Premier Sausage-Macon Valley Nursing &amp; Rehabilitation Center deal <span>➡️</span> \$30,625 Macon Valley Nursing &amp; Rehabilitation Center</p>	<p>👤 Premier Sausage-New Dawn Health Care deal <span>➡️</span> \$16,100 New Dawn Health Care</p>

# OpTRADE and CRM Connectivity

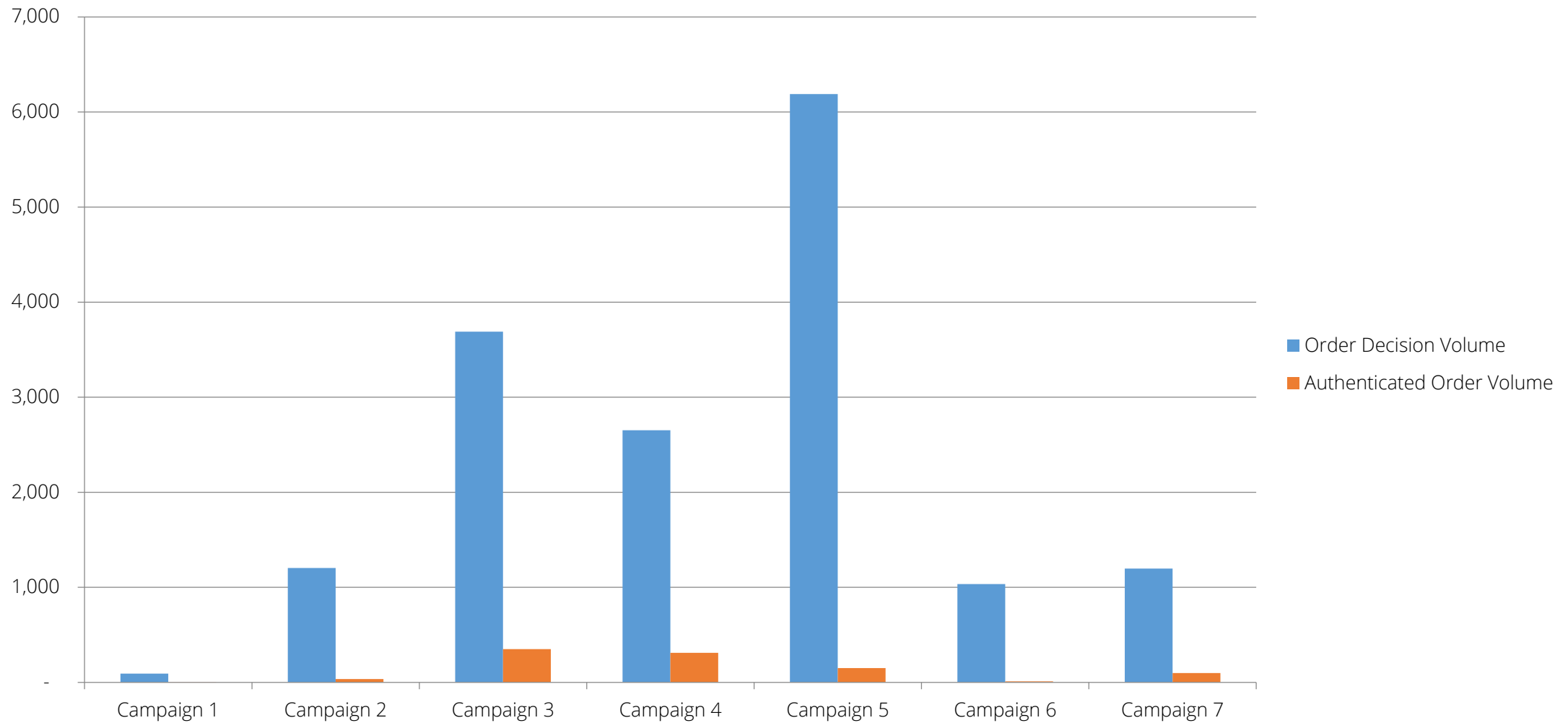
Essential to data accuracy is resolving and maintaining **Operator Aliases**



# Campaign Launch and CRM Measures

- New Hunting License
- New Products on Contract
- Sent Broadly to the Sales Team
- Wins Reported in CRM
- Who made the sale-Direct Sales Team, Broker, Other Channel?
- Reviewed Weekly by Leadership Team

# Measurement



# Measurement Case Study for Authenticating Sales

Campaign Name	Order Decisions (Item/Location Combo)	Order Decision Volume	Authenticated Case Volume	Authenticated Case%	Order Decisions with Any Claimed Volume	Order Decision%
Campaign 1	4	92	3	3%	1	25%
Campaign 2	28	1,204	35	3%	7	25%
Campaign 3	151	3,690	350	9%	51	34%
Campaign 4	83	2,652	311	12%	52	63%
Campaign 5	247	6,189	151	2%	32	13%
Campaign 6	25	1,034	11	1%	3	12%
Campaign 7	208	1,198	98	8%	61	29%
Total	746	16,059	959	6%	207	28%



# Why Didn't They Buy

## ORDER PAST DUE CHECKLIST

- ✓ Forgot to Order
- ✓ On the Order Guide
- ✓ In the Distribution Center
- ✓ Recent Competitive Activity
- ✓ Resource Change at the Operator
- ✓ Wrong Price



# Sales Opportunity Types

Use the Explore Operator Purchases and Growth Tabs to inform your sales call plans.



## Key Concept

Important to understand before we advance

# Operator Campaign Process

Directed **last mile execution** with measured results leveraging multiple selling channels

Which operators?

What products?

What sales channel?

What was the result?

ANALYZE

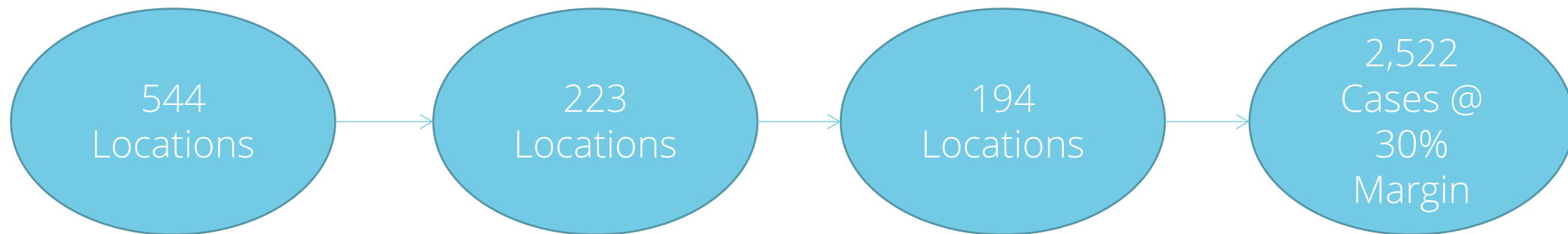
DEVELOP

EXECUTE

MEASURE

# OpTRADE Lift

- Using the median as an example, if there are a total of 544 locations in all the OpX Tiers and are 223 Very Large locations and 29 of those locations buy more than 3 cases - trailing 7 months. This leaves 194 locations that are technically white space or very low volume. The median very large buys 13 cases. So if 194 locations bought the median 13 cases they could sell another 2,522 cases.
- To calculate OpTRADE share in this example: sold 689 cases (again trailing 7 months) aggregate, and could sell another 2,522. The OpTRADE share is 27%.
- Could compile by high level categories (Protein, Beverage, Veg) to focus on super categories.





# The Real Volume

**Operator Purchases Tab:** True Operator Volume in Overlapping Promotional Environments





# The Real Volume

**Operator Purchases Tab:** True Operator Volume in Overlapping Promotional Environments



**ONLY WITH OpTRADE...**

Accurately de-duplicate overlapping rebate and billback data that is updated weekly so can you know the real volume.



# Prioritize Growth

**Growth Tab:** Prioritize your growth opportunities



**GROWTH**

SEGMENT:

- K-12
- HOSPITAL
- C&U
- SMALL FULL-SERVICE RESTAURANT

SIZE:

- LARGE
- AVERAGE
- SMALL



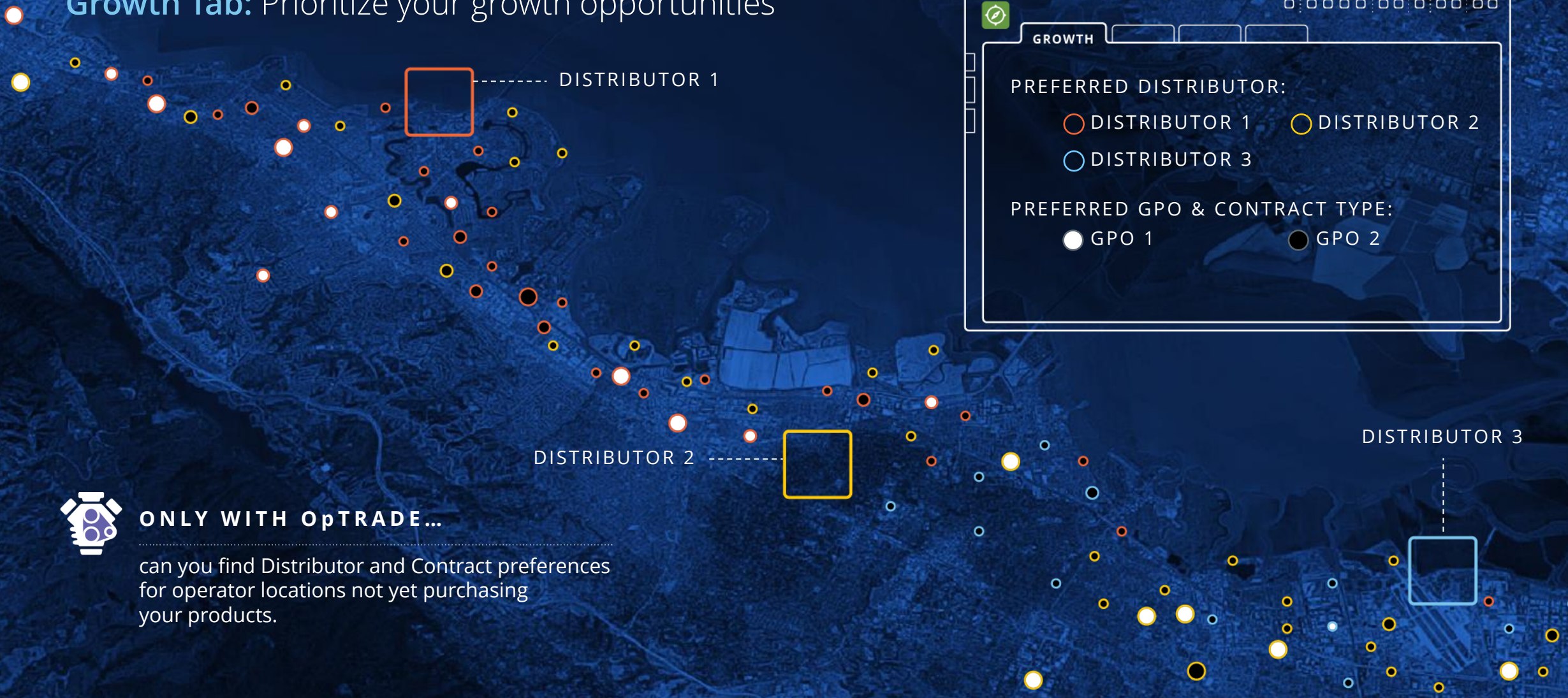
## ONLY WITH OpTRADE...

can existing account opportunities be distinguished from new account opportunities.



# Prioritize Growth

**Growth Tab:** Prioritize your growth opportunities



**GROWTH**

PREFERRED DISTRIBUTOR:

- DISTRIBUTOR 1
- DISTRIBUTOR 2
- DISTRIBUTOR 3

PREFERRED GPO & CONTRACT TYPE:

- GPO 1
- GPO 2



## ONLY WITH OpTRADE...

can you find Distributor and Contract preferences for operator locations not yet purchasing your products.



# The Real Deal

**Campaign Tab:** Measure True Campaign Lift and ROI

○ WHITESPACE LOCATIONS

● SALES GOT A NEW DECISION TO START ORDERING



# The Real Deal

**Campaign Tab:** Measure True Campaign Lift and ROI

The screenshot shows a software interface with a 'CAMPAIGN' tab selected. Below the tab is a legend with three items:

- WHITESPACE LOCATIONS
- SALES GOT A NEW DECISION TO START ORDERING
- AUTHENTICATED ORDERS



**ONLY WITH OpTRADE...**

Can you scan location-level trade claim volume and marry it with new operator order decisions from your CRM system.



# Analyze

**BLUE** Quarterback Resource or Key Component

**YELLOW** Supporting Player or component



# Develop

**BLUE** Quarterback Resource or Key Component

**YELLOW** Supporting Player or component





# Execute

**BLUE** Quarterback Resource or Key Component

**YELLOW** Supporting Player or component



# Measure

**BLUE** Quarterback Resource or Key Component

**YELLOW** Supporting Player or component



# Campaign Scenario



## ANALYZE

Lead: Jasper General Hospital  
15 S Sixth Street  
Bay Springs, MS 39422  
OpX: Very Large (88)  
My OpX Size: Large (62)

## MEASURE

July: 30 Cases  
August: 50 Cases  
September: 75 Cases  
October: 15 Cases

## EXECUTE

Order Decision: Annual  
Cases-950  
Close Date: 6/30/2017  
First Ship Date: 7/14/2017

## DEVELOP

Opportunity:  
1lb Coffee - 003053  
Program Offer: Premier  
Campaign: Premier Coffee  
Program Summer 17  
750 Cases, \$26,250

# Campaign Scenario

## MEASURE

July: 30 Cases  
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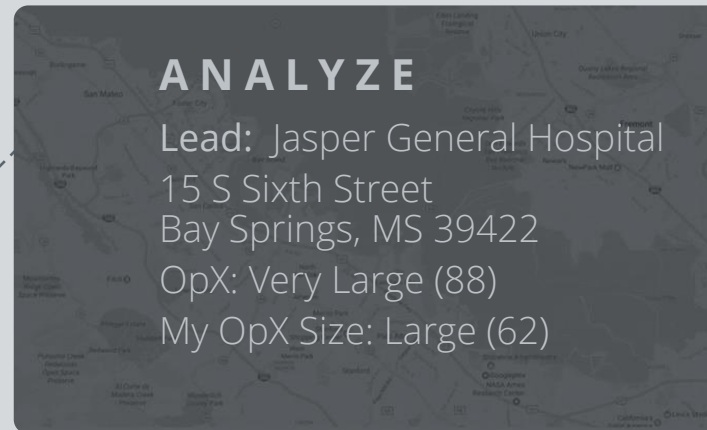
## DEVELOP

Opportunity:  
1lb Coffee - 003053  
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Campaign: Premier Coffee  
Program Summer 17  
750 Cases, \$26,250

# Campaign Scenario



**MEASURE**  
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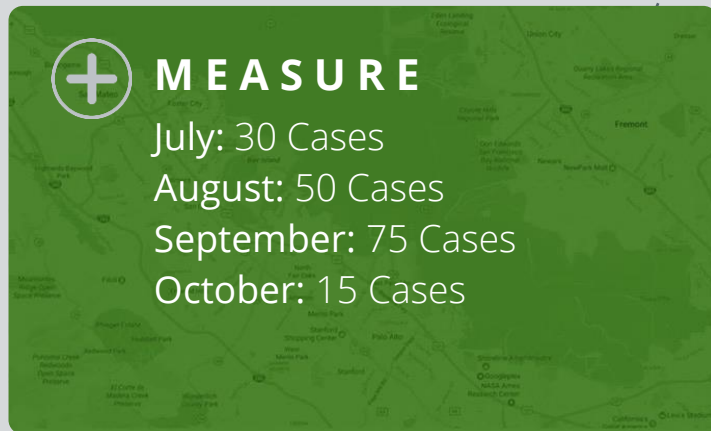


**+ EXECUTE**  
Order Decision: Annual  
Cases-950  
Close Date: 6/30/2017  
First Ship Date: 7/14/2017

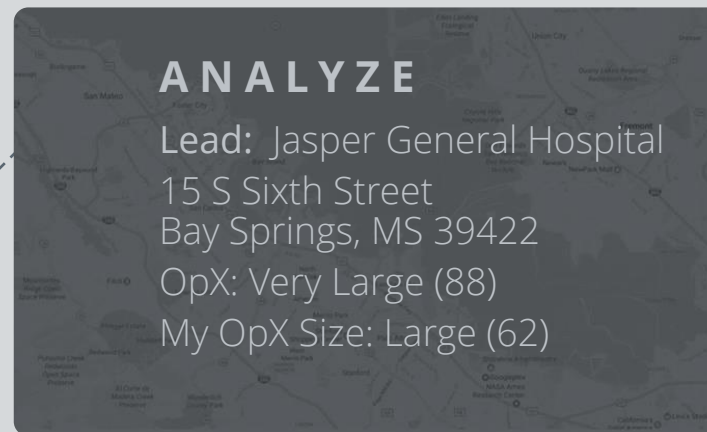


**DEVELOP**  
Opportunity:  
Breakfast Sausage CA - 003053  
Program Offer: Premier  
Campaign: Premier Breakfast  
Sausage Summer 17  
750 Cases, \$26,250

# Campaign Scenario



**+** **MEASURE**  
July: 30 Cases  
August: 50 Cases  
September: 75 Cases  
October: 15 Cases



**ANALYZE**  
Lead: Jasper General Hospital  
15 S Sixth Street  
Bay Springs, MS 39422  
OpX: Very Large (88)  
My OpX Size: Large (62)



**EXECUTE**  
Order Decision: Annual  
Cases-950  
Close Date: 6/30/2017  
First Ship Date: 7/14/2017



**DEVELOP**  
Opportunity:  
Breakfast Sausage CA - 003053  
Program Offer: Premier  
Campaign: Premier Breakfast  
Sausage Summer 17  
750 Cases, \$26,250





# Customer Financial Review





# Customer Financial Review



- Background
- What will it provide?
- What is the solution?



# Customer Financial Review



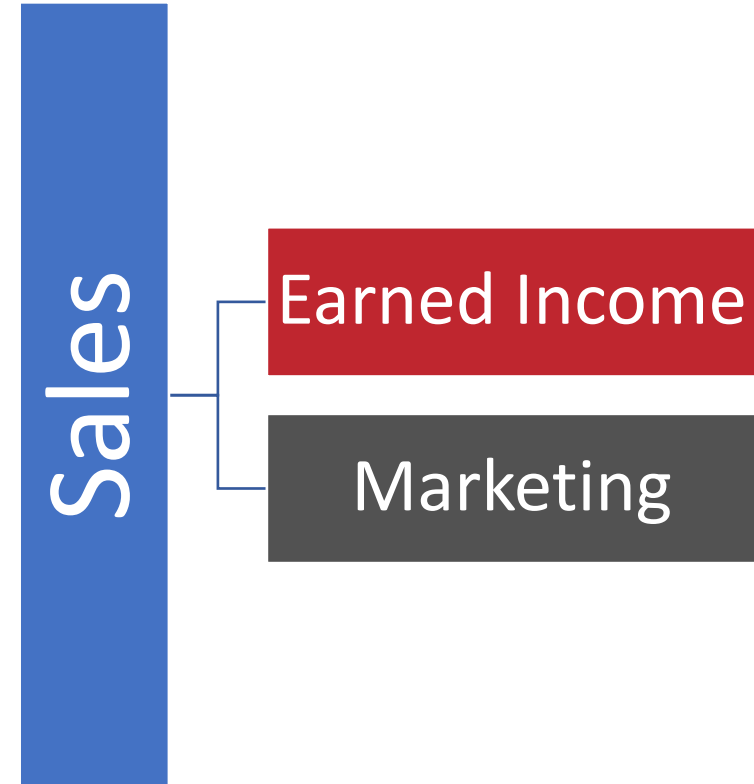
- Background
  - Distributor Review is complete
  - Taking Distributor Review and including Trade is next
- Simplicity vs Detailed
  - Multiple instances built by Tibersoft Staff
  - As simple as 5 data elements that are loaded
  - As Detailed as 30 inputs, with multiple levels of allocation
- Step into a phased approach that each client can go as far as they want in the phases



# What Will It Provide?



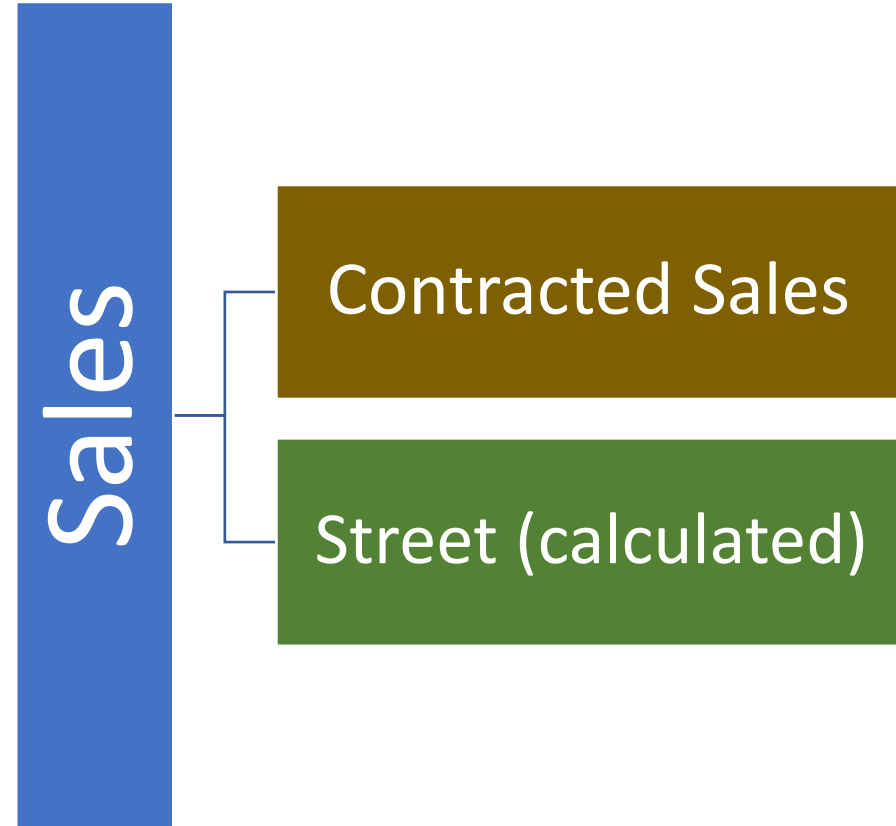
1. Starting with Sales to Distributors
2. Connecting Distributor Trade to Sales



# What Will It Provide?



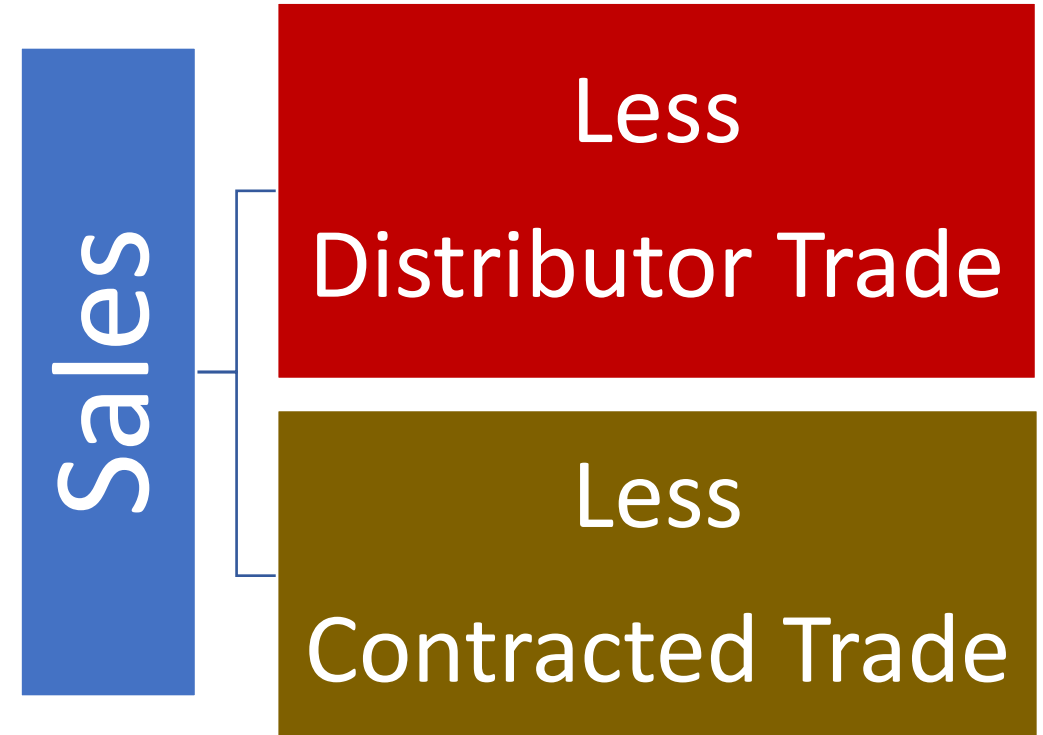
1. Starting with Sales to Distributors
2. Connecting Distributor Trade to Sales
3. Connecting Operator Trade to Sales
4. Provides Distributor Review
  1. Contracted vs Street



# What Will It Provide?



1. Starting with Sales to Distributors
2. Connecting Distributor Trade to Sales
3. Connecting Operator Trade to Sales
4. Provides Distributor Review
  1. Contracted vs Street
5. Provides Cost to Service



# What Is It?



## 1. Cost to Service

1. Distributor Trade
2. Operator Trade

## 2. What is the cost at several levels

1. Distributor/DC
2. Operator/GPO
3. Category/Item
4. Location



# Explorify it with Pivots

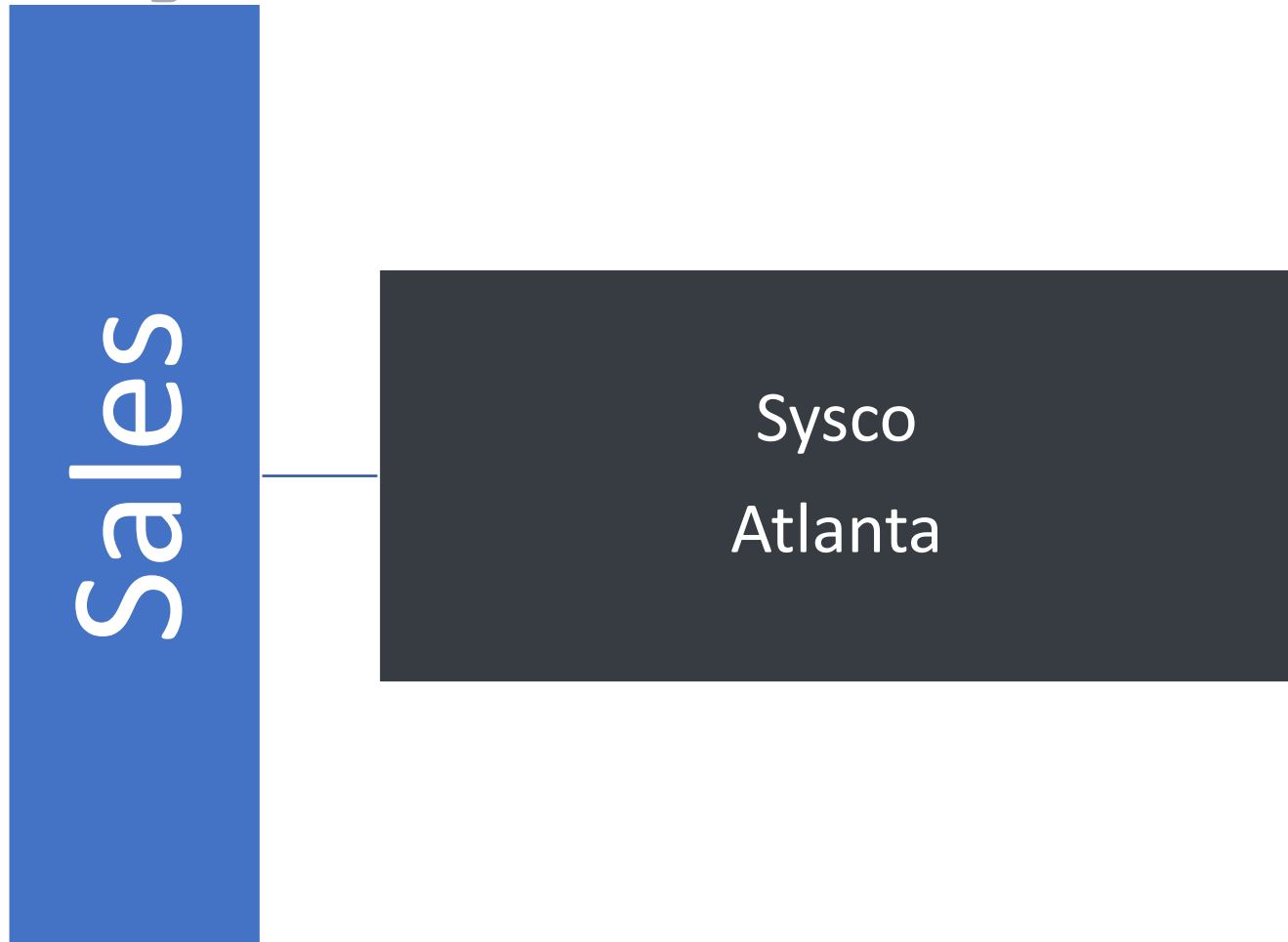


Sales

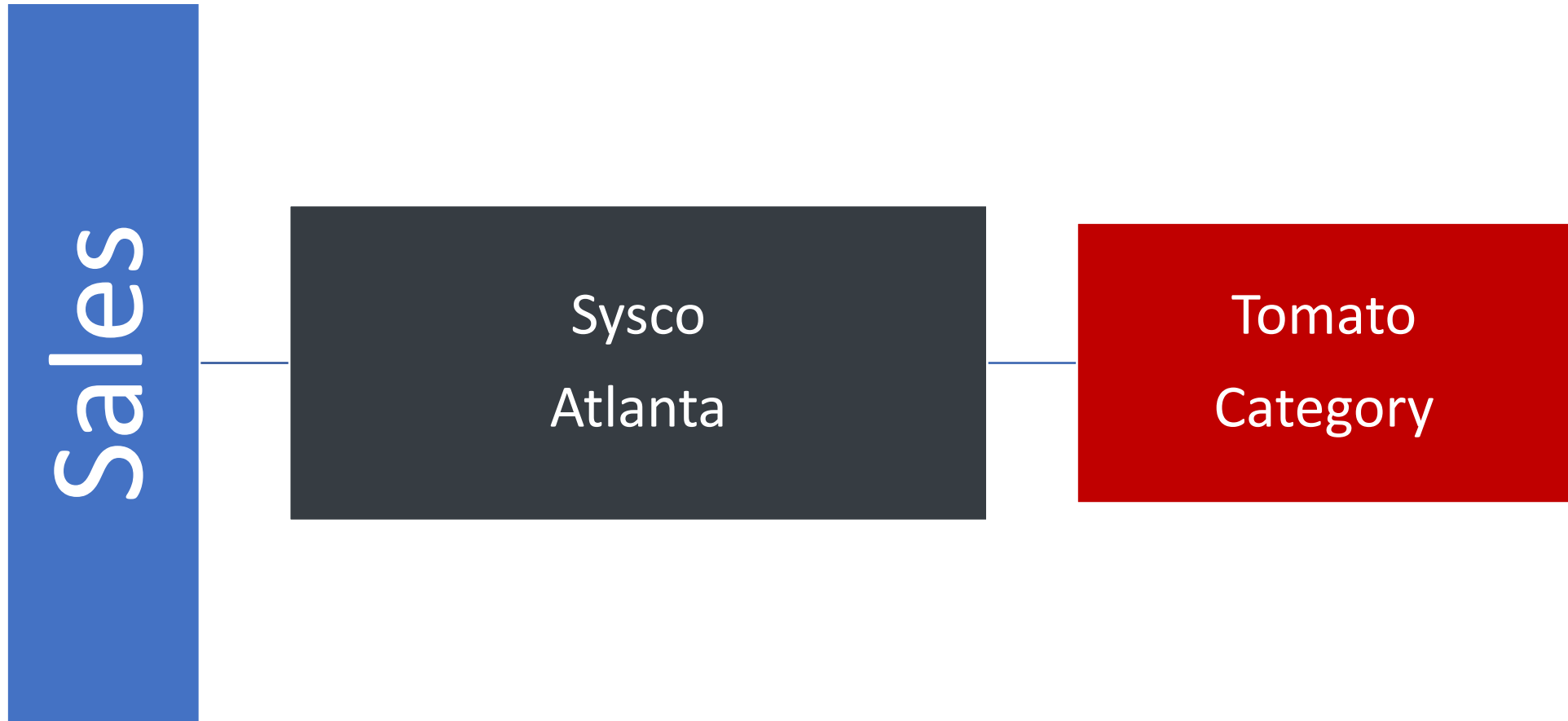




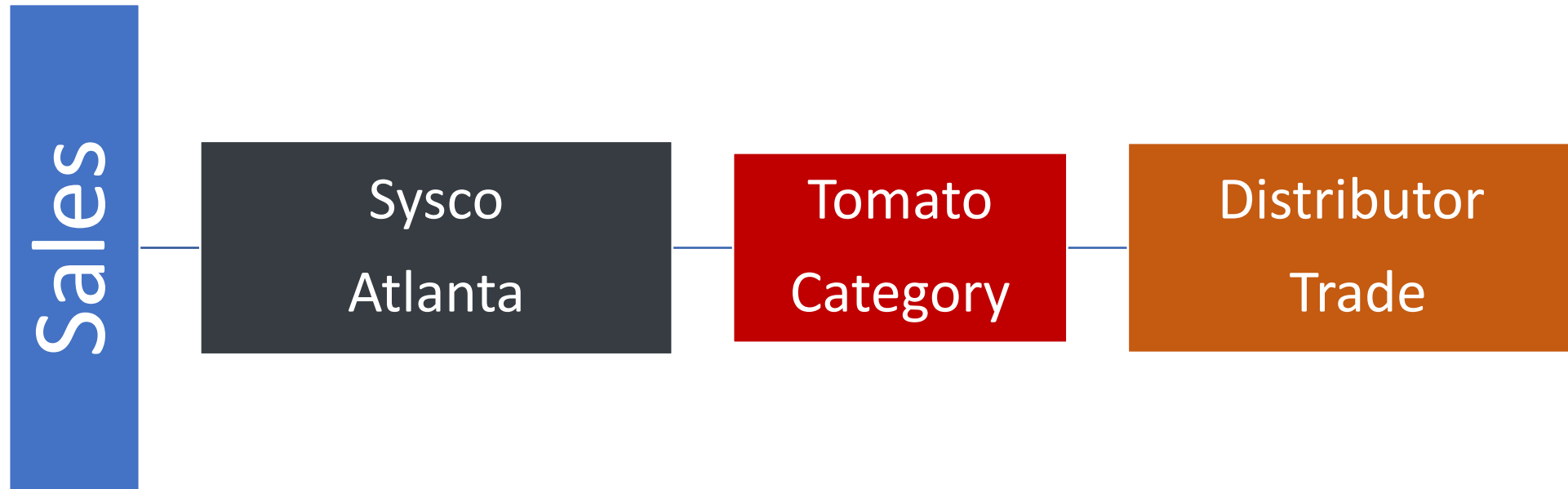
# Explorify it with Pivots



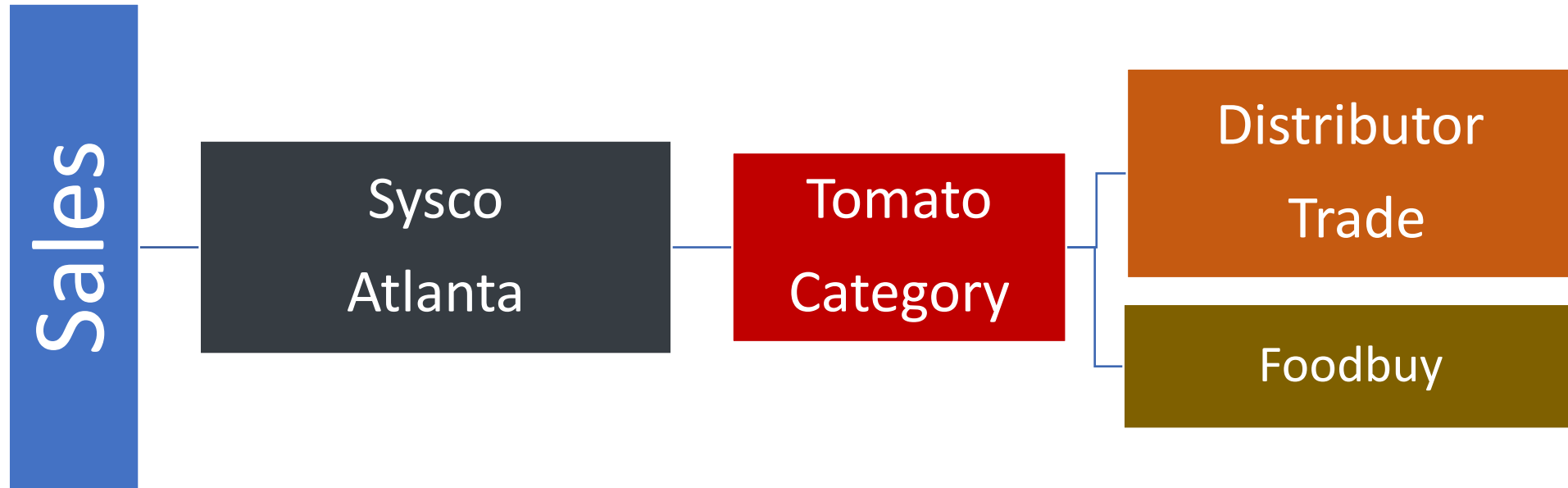
# Explorify it with Pivots



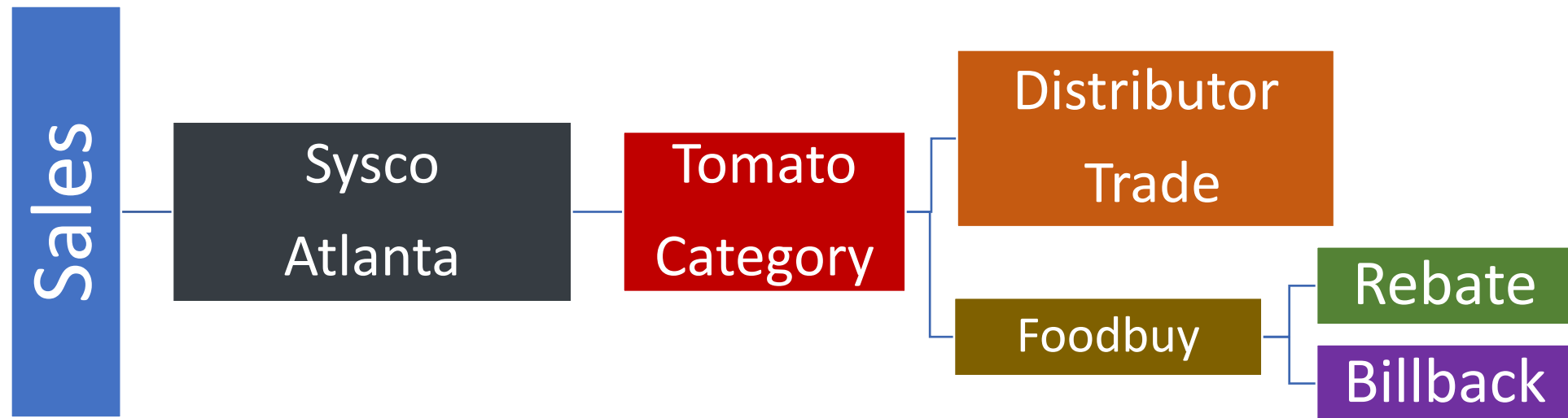
# Explorify it with Pivots



# Explorify it with Pivots



# Explorify it with Pivots



Sales

Gross Sales \$20,000

- Returns and Allowances - \$500

- Cash Discounts \$200

- Freight \$600

= Net Sales \$18,700

Add a card...

Gross Margin

Net Sales \$18,700

- COGS \$3,500

= Gross Margin \$15,200

Add a card...

Net Margin

Gross Margin \$15,200

- Operator Trade Spending \$1,500

- Distributor Trade Spending \$300

- Brokerage Commissions \$700

- Other Commissions

= Net Margin \$12,700

Add a card...

Net Income

Net Margin \$12,700

- SG&A \$240

- Marketing and Advertising \$315.60

= Net Income \$12,144.40

Add a card...







## Sales



## Transaction Feed

Gross Sales \$20,000

## Transaction Feed

- Returns and Allowances - \$500

## Transaction Feed

- Cash Discounts \$200

## Transaction Feed

- Freight \$600

## Transaction Feed Calculation

= Net Sales \$18,700

Add a card...

## Gross Margin



## Transaction Feed Calculation

Net Sales \$18,700

## Transaction Feed Factor Offline

- COGS \$3,500

## Calculation

= Gross Margin \$15,200

Add a card...

## Net Margin



## Calculation

Gross Margin \$15,200

## Transaction Feed

## Tibersoft Managed

- Operator Trade Spending \$1,500

 0/5

## Transaction Feed

## Tibersoft Managed

- Distributor Trade Spending \$300

 0/3

## Table Transaction Feed Factor

- Brokerage Commissions \$700

## Table Transaction Feed Factor

- Other Commissions



## Calculation

= Net Margin \$12,700

 0/4

Add a card...

## Net Income



## Calculation

Net Margin \$12,700

## Factor

- SG&amp;A \$240

## Factor

- Marketing and Advertising \$315.60

## Calculation

= Net Income \$12,144.40

Add a card...



# End Poll #1 – ‘Keep Doing This...’



# End Poll #2 – ‘Start Doing This...’





# End Poll #3 – Meeting in One Word



illuminating inspiring motivating

**informative**

versatility **skavnak** the art of the possible  
roadmap learning open

