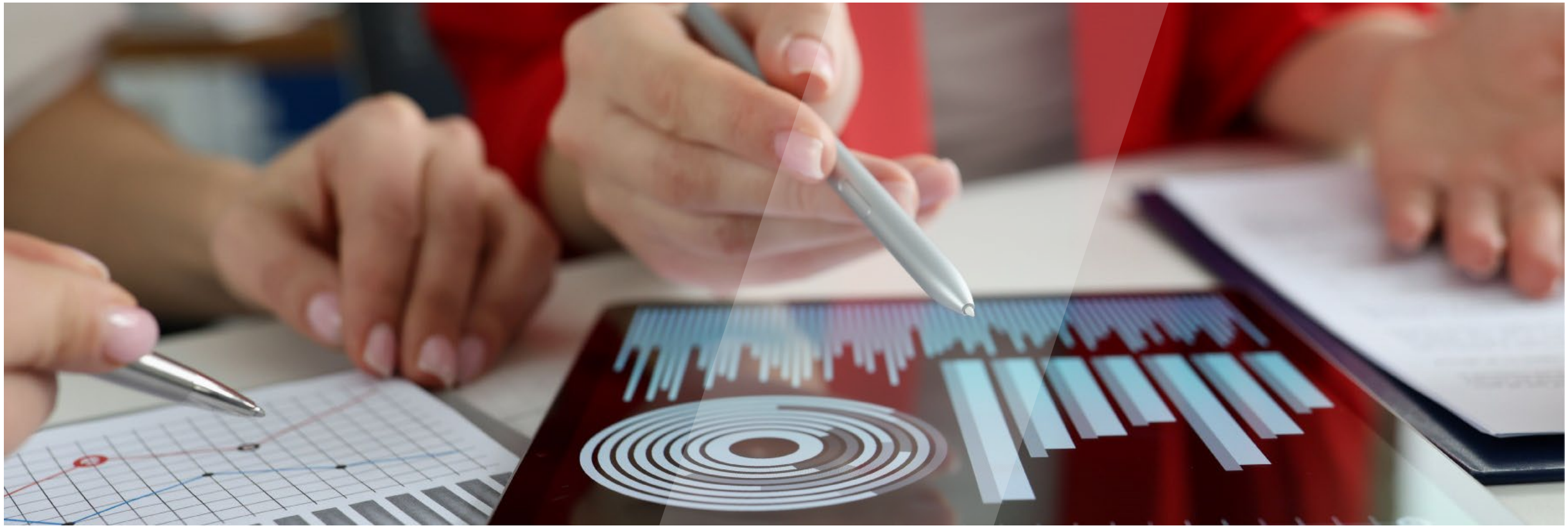

How Distributors Can Use CRM to Set, Track, & Manage Sales

October 17, 2024

Microsoft Partner

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Global Presence

Top 10
Global Network*

$5bn
Combined Revenue (2023)

100+
Combined Countries & Territories

400+
Combined Offices & Locations

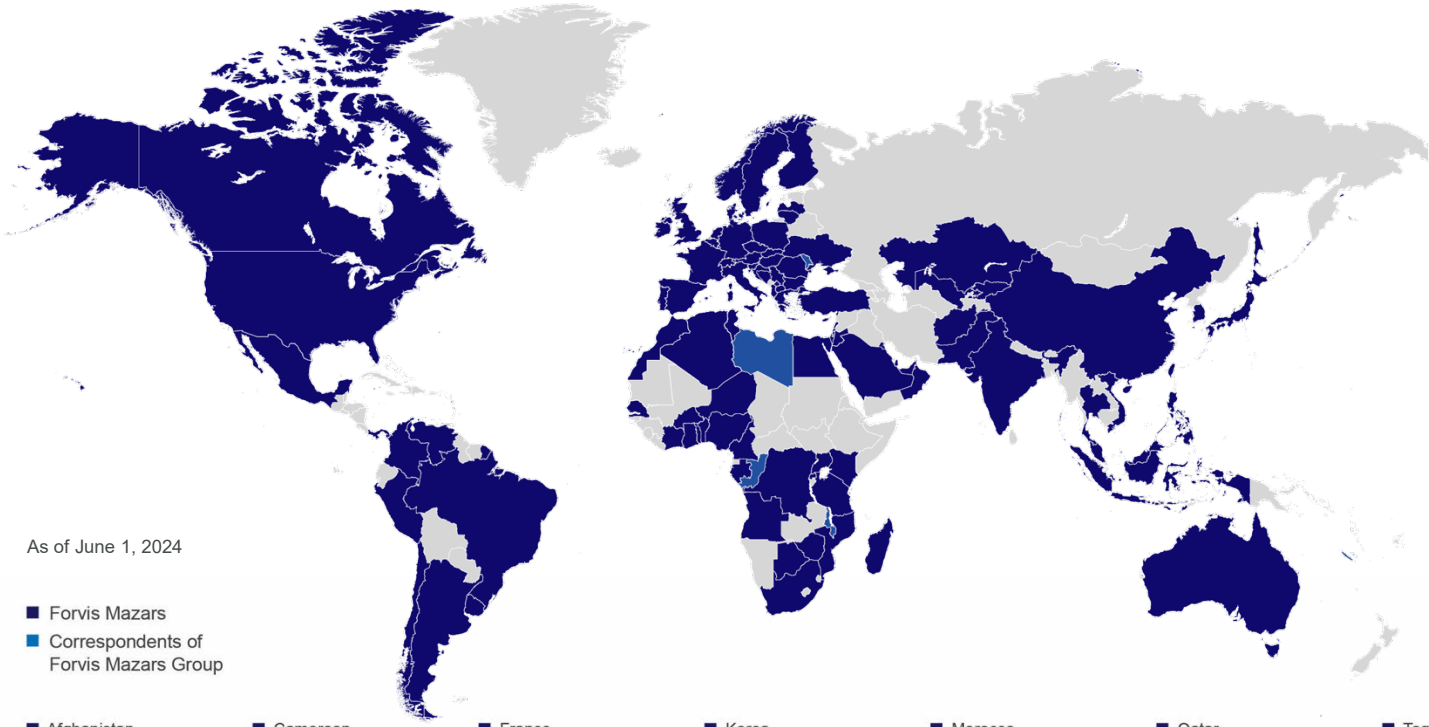
1,800+
Combined Partners

40,000+
Combined Employees

* Source: IAB World Network rankings, based on most recent rankings

2023 revenues: FORVIS $1.7bn (€1.6bn), Mazars (expected) $3bn (€2.8bn)

Forvis Mazars is the brand name for the Forvis Mazars Global network (Forvis Mazars Global Limited) and its two independent members: Forvis Mazars, LLP in the United States and Forvis Mazars Group SC, an internationally integrated partnership operating in over 100 countries and territories.



- Afghanistan
- Albania
- Algeria
- Angola
- Argentina
- Australia
- Austria
- Bahrain
- Belgium
- Benin
- Bermuda
- Bosnia and Herzegovina
- Botswana
- Brazil
- Bulgaria
- Burkina Faso
- Cameroon
- Canada
- Cayman Islands
- Chile
- China
- Colombia
- Congo
- Côte d'Ivoire
- Croatia
- Cyprus
- Czech Republic
- Democratic Republic of the Congo (DRC)
- Denmark
- Egypt
- Finland
- France
- Gabon
- Germany
- Ghana
- Greece
- Hong Kong
- Hungary
- India
- Indonesia
- Ireland
- Israel
- Italy
- Japan
- Jordan
- Kazakhstan
- Kenya
- Korea
- Kosovo
- Kuwait
- Kyrgyzstan
- Latvia
- Lebanon
- Libya
- Lithuania
- Luxembourg
- Madagascar
- Malawi
- Malaysia
- Malta
- Mauritius
- Mexico
- Moldova
- Morocco
- Mozambique
- Netherlands
- New Caledonia
- Niger
- Nigeria
- North Macedonia
- Norway
- Oman
- Pakistan
- Palestine
- Panama
- Peru
- Philippines
- Poland
- Portugal
- Qatar
- Romania
- Rwanda
- Saudi Arabia
- Senegal
- Serbia
- Singapore
- Slovakia
- Slovenia
- South Africa
- Spain
- Sweden
- Switzerland
- Taiwan
- Tanzania
- Thailand
- Togo
- Tunisia
- Türkiye
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- Uruguay
- Uzbekistan
- Venezuela
- Vietnam
- Zimbabwe

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Business Technology Services

Forvis Mazars provides enterprise resource planning (ERP) & customer relationship management (CRM) platform analysis, design, implementation, upgrade, training, & support services.

Our end-to-end solutions help clients achieve their digital transformation goals by:

- Creating effective processes & strategies for future operations
- Designing & implementing modern operational systems
- Reviewing new business-facing technologies
- Leveraging existing investments in legacy technologies
- Integrating data solutions

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Business Technology Services

ERP

- Microsoft Dynamics 365
  - Finance
  - Supply Chain
  - Commerce
  - Project Operations
  - Business Central
  - Dynamics GP
- NetSuite
- Sage & Sage Intacct
- Trimble Viewpoint Spectrum & Vista

CRM

- Microsoft Dynamics 365
  - Sales
  - Customer Service
  - Customer Insights
  - Field Service
- Salesforce
- Marketing Automation

Advanced Technology

- Insights
  - Microsoft Power BI
  - Solver Planning & Analysis
- Automation
  - Microsoft Power Platform
  - Robotic Process Automation (RPA)
- App Development

Managed Services for business applications, IT, & cybersecurity support.

Microsoft Partner

ORACLE NETSUITE Solution Provider

Sage Partner

salesforce PARTNER

solver

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Today’s Presenter

Microsoft Practice

“Our team is focused on delivering an Unmatched Client Experience® on every engagement.”

– Chad Back, Partner

Steve Reybrock

Managing Consultant

steve.reybrock@us.forvismazars.com

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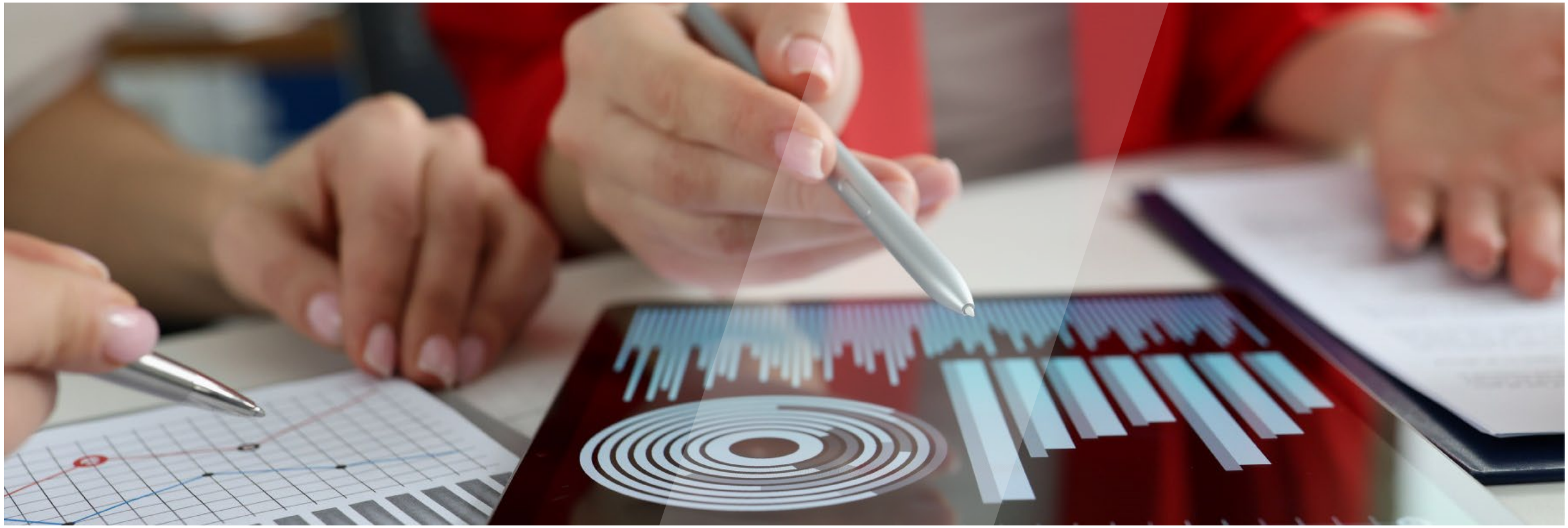

How Distributors Can Use CRM to Set, Track, & Manage Sales

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Objectives

1. Discuss how to analyze sales quota gap to goal (volume &/or gross profit)
2. Demonstrate how to track volume &/or gross profit goals versus actuals
3. Explain how to create an easy-to-access, 360-degree view of customers
4. Describe how to set & monitor key performance indicators

01

Microsoft Dynamics 365 CRM Solutions

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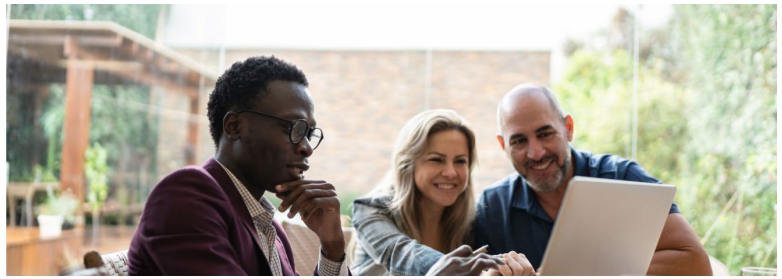
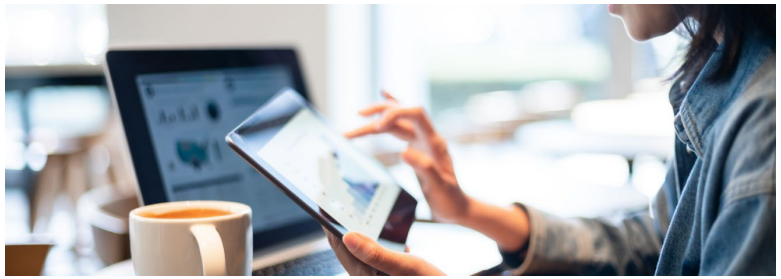
FOR MICROSOFT BUSINESS APPLICATIONS

What Is CRM?
Traditional CRM Components



Sales

- Lead management
- Account & contact management
- Opportunity/pipeline/forecast tracking
- Quote management
- Orders management
- Activity tracking



Marketing

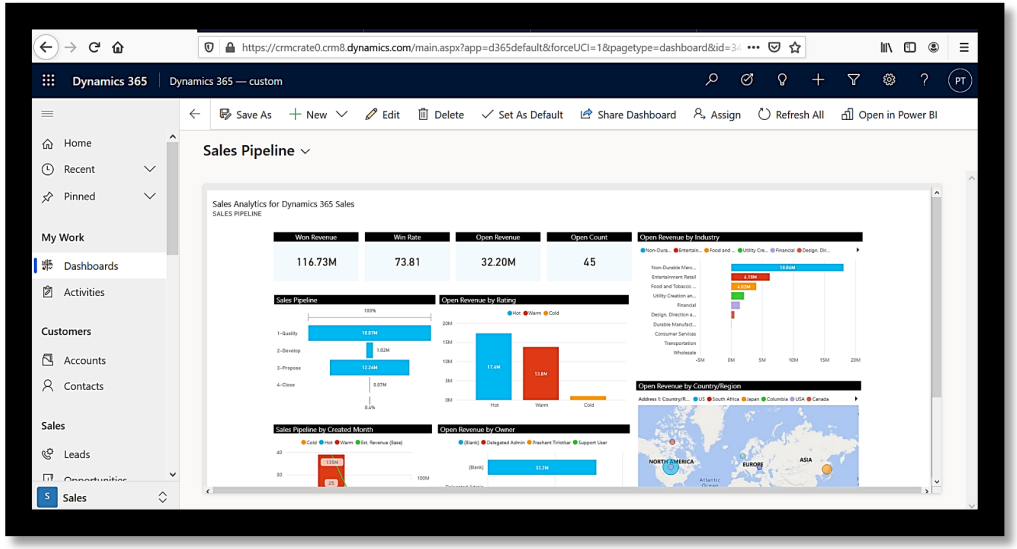
- Campaigns & customer journeys
- Segmentation
- Lead scoring & data capture

Service

- Case management
- SLAs
- Knowledge base
- Customer surveys

Why Use CRM?
Reasons to Consider

1. No centralized, easily accessible system in place for sales
2. Too many manual, time-consuming processes
3. Cannot measure effectiveness of sales, marketing, or customer service
4. Complex sales process
5. Low sales productivity
6. Relationship tracking not captured or centralized
7. Reporting & data analytics not easy to get or not accurate
8. Sales & marketing teams aren't aligned
9. Customer data is replicated & maintained in multiple systems
10. Customer retention concerns
11. Lack of collaboration & insight across the business



Why Use CRM?
Key Benefits

Business Benefits Gained

- Collaboration across the business
- Efficiency & productivity
- Standardization of processes & data
- Automation
- Centralization of data
- Awareness & insights

Attainment of Business Goals

- Growth
- Innovation
- Scalability
- Value-added long-term customer relationships

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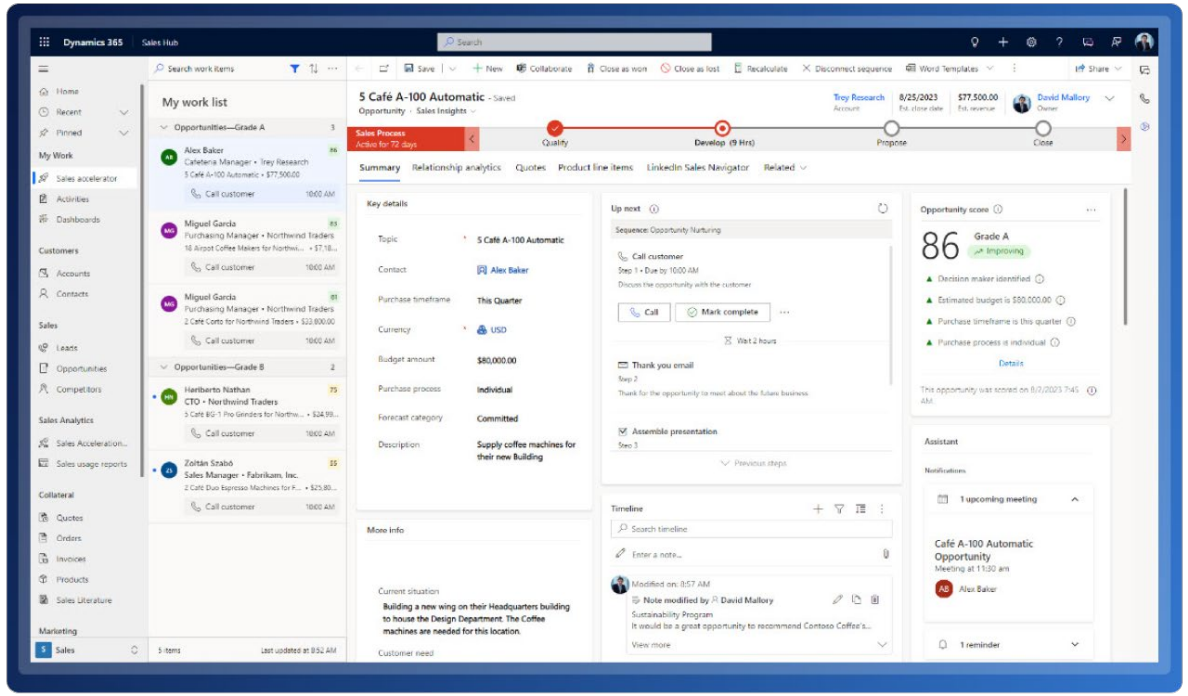
Recent CRM User Group Poll

What's your favorite feature?



Results

- **32%** Reports
- **12%** All data at your fingertips for Account Management
- **11%** Activity Tracking
- **7%** Mobile App
- **7%** Charts & Dashboards

02

Key Functionality for Distributors

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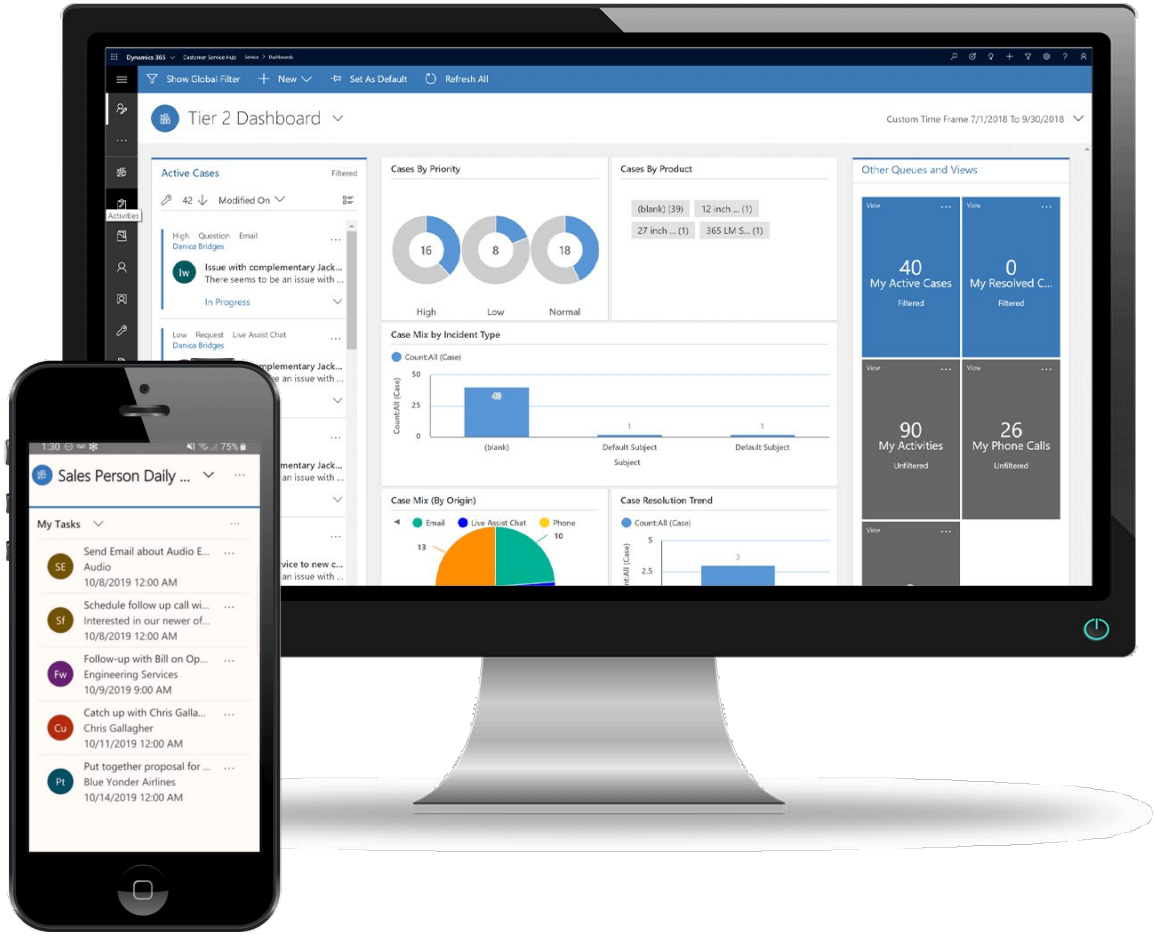
How Distributors Use CRM

Set, Track, & Manage Sales

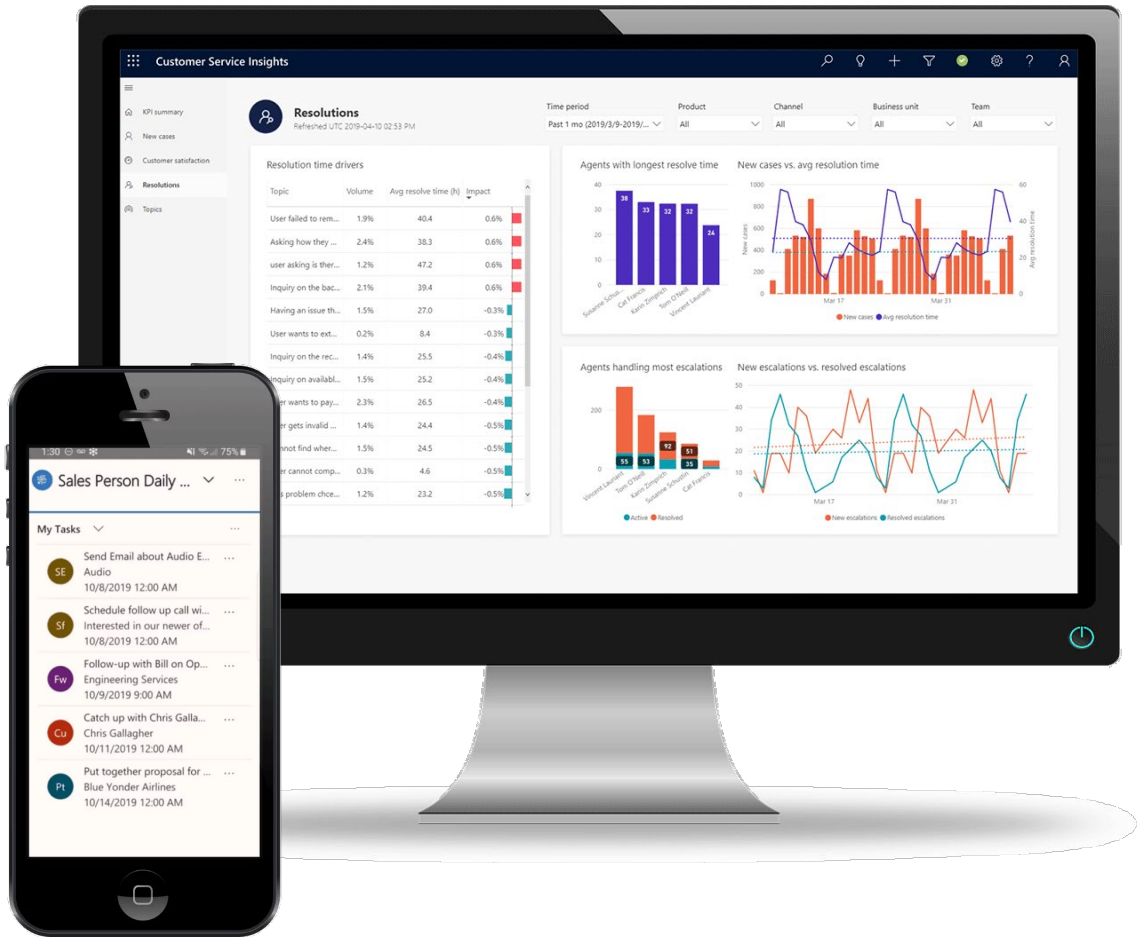
- **Navigation**
- **Data Integration**
  - Accounts
  - Products
  - Order History
  - Generic Price Lists
  - Account Notes
  - Product Balances
  - Account Product Prices
- **Data Visualization**
  - Charts, Dashboards, Reports & Scheduled Reports, Filters, Interacting With the Data, & More!



How Distributors Use CRM

Set, Track, & Manage Sales

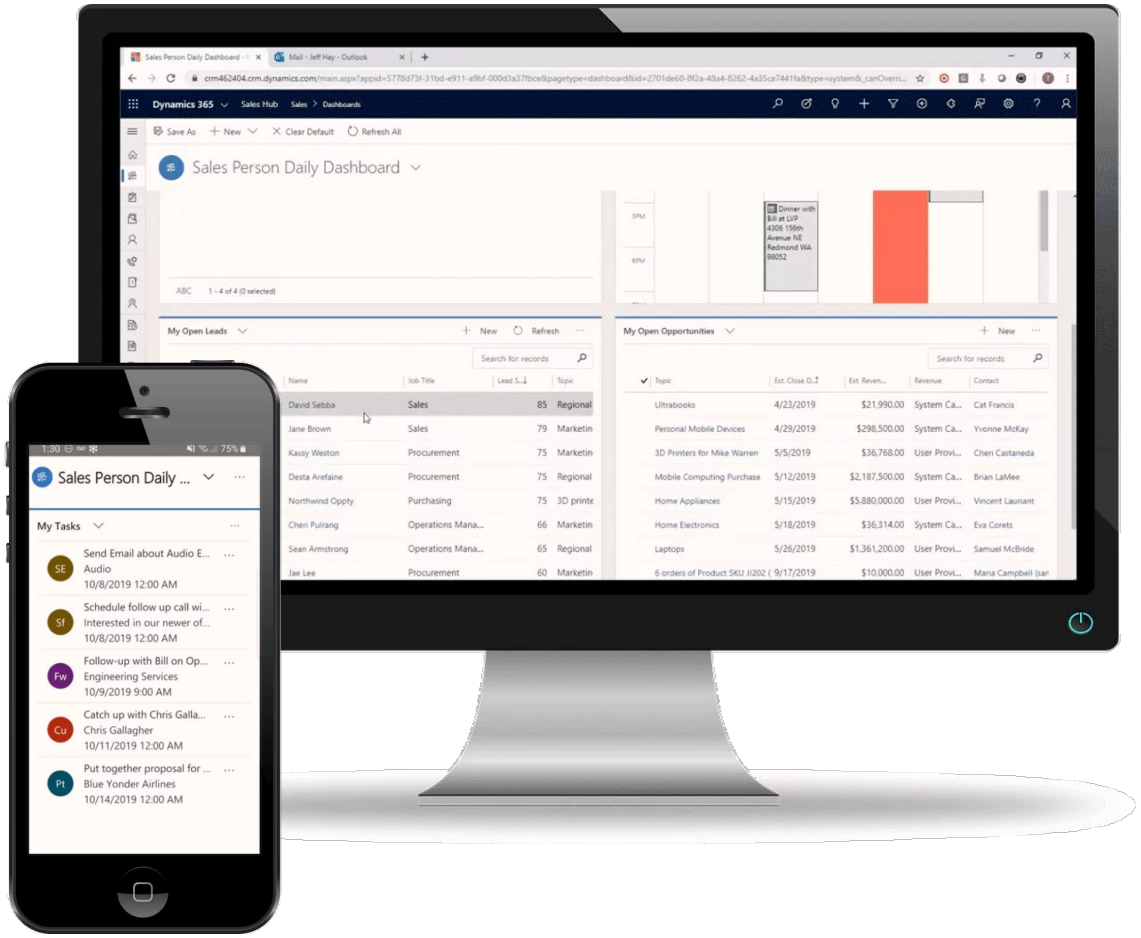
- Leads
- Accounts, Contacts, & Opportunities
- Estimated Days Between Orders
- Suggestive Sell
- Competitor Share of Wallet
- Opportunity Sales Process
- Quotes



How Distributors Use CRM

Set, Track, & Manage Sales

- GP &/or Volume Goal Setting
- Goal vs. Actual
  - Gap to Goal
- Activities & Notes
- Equipment Tracking
- Fuel Price Notifications
- Territory Management
- Mobile Access
- Key Performance Indicators (KPIs)



03

Product Demonstration

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Q&A

Business Technology Services

Questions?

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