



vision

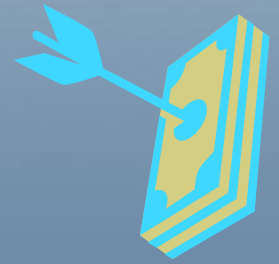
# eXtending CRM to the Web

Customer facing CRM for the future

David Fertig – June 11 2007 HIDA Ops Conference



# The Goal



The Business of  
Business is getting and  
keeping customers

- Peter Drucker



# Measurement

**The only acceptable answer to a customer service survey is  
EXCELLENT!!!**

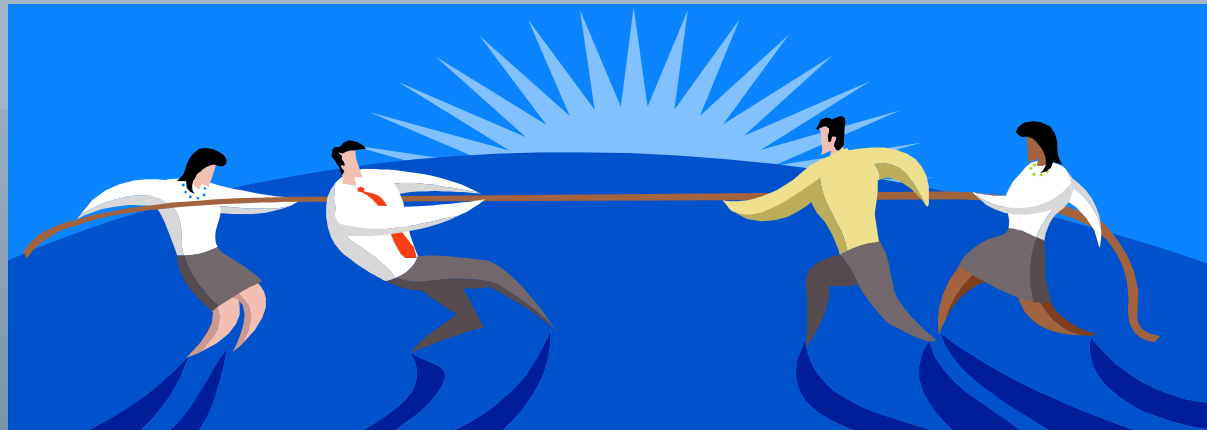




# Viewpoint



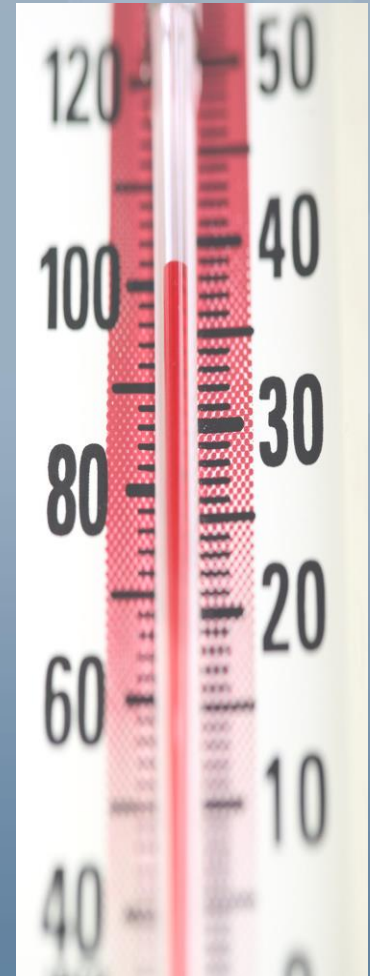
- ❑ If you lost 10% of your inventory year over year – you would investigate and correct the issues



- ❑ According to Gartner Group most distributors lose up to 25% of their customers a year



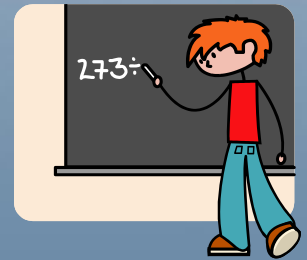
# By the numbers



- It costs five times more to get a new customer than to retain a current one.
- 26 out of 27 customers fail to report a bad experience.
- Customers don't report bad experiences because they feel you won't do anything about it.
- 91% won't return
- 13% will tell 20 or more people, further polluting your reputation.
- Tom Peters in Thriving on Chaos



# By The Numbers #2



- 82 to 95 % come back if the situation is resolved well and in a timely manner.
- A well-handled problem usually breeds more loyalty than before the negative incident.



Integrating People with  
Process and Technology  
“Gaining Employee  
Acceptance of  
Technology Initiatives”  
Dr. Jon Anton  
Purdue University  
Center for Customer-Driven  
Quality

*If you build a new plant it starts  
losing value the day you complete it.  
But a customer increases in value  
year over year. – McGreevy*



# Today's Discussion



- Examine some new tools in the customer service arena
- Learn to address customer need's proactively – don't wait for the complaint
- See what others have accomplished





# What are the tools available?



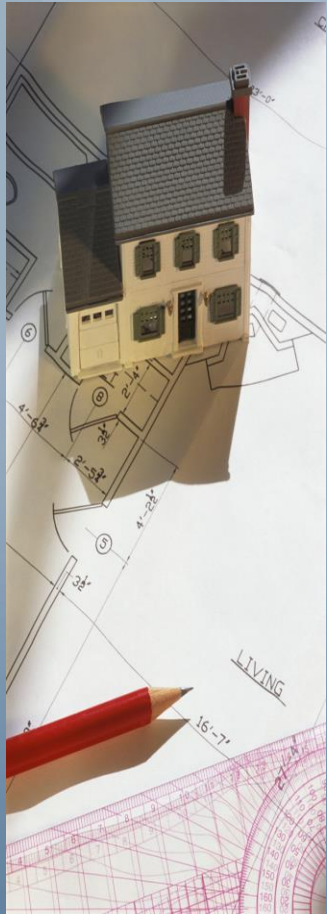
- Track issues (Internally/Externally)
  - Order Status/Backorder/Shipments
  - Returns
  - Billing Disputes
  - Payments and Invoices
- Real time Collaboration
  - Support issues and training
  - Sales and Detailed product info
- Inventory visibility (supply chain)







# “Designing a System”



- Workflow and Routing
- Customer Bill of Rights
- Published Service Levels/Standards
- Golden Opportunity for change
- Complaint Management
  - Identify
  - Resolve
  - Learn

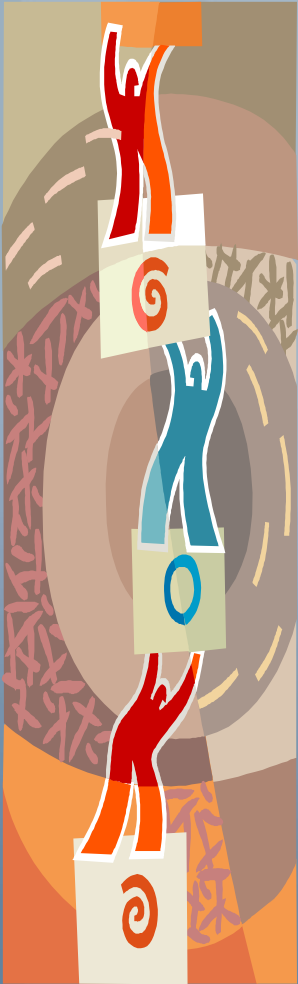




# Demonstrate Customer Appreciation



- Provide responsive and measurable service
- Set a timeline for a call back and document how often you achieve it
- Give instructions and training
- Invite customer opinions with polling and email feedback
- Share testimonials
- Utilize Email and Web Meetings

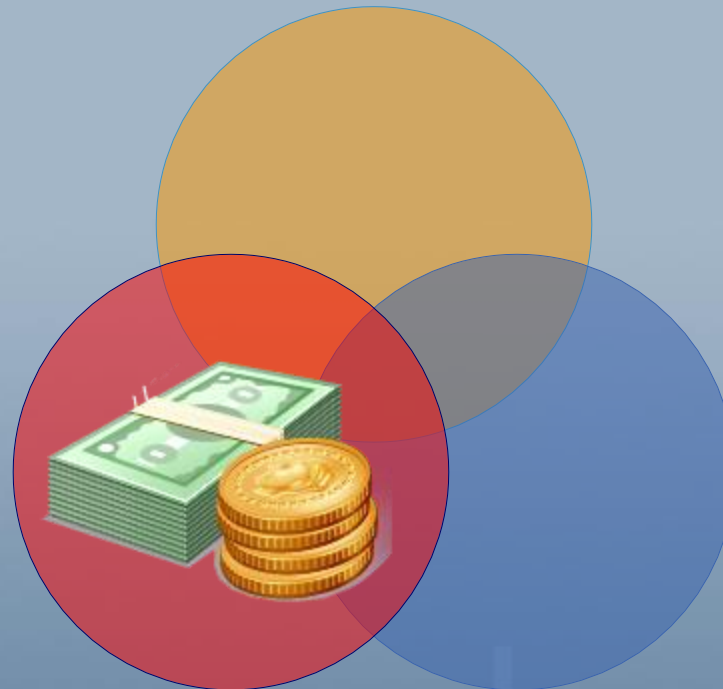




# The Three R's



Retention



Revenue

Referrals



# Customers are your best resource

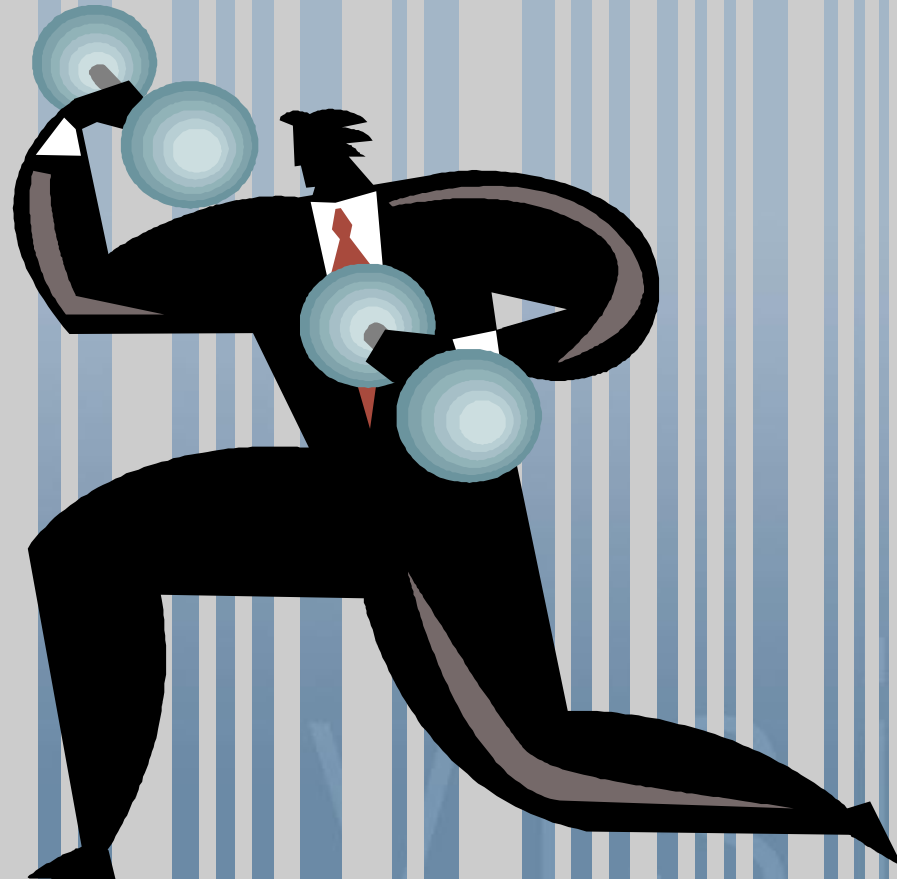


- Give them the tools to help you help them
- Doctors will often be thankful for a 24/7 invoice review process
- Knowledgebase will allow them to answer their own questions
- Information will now be accessible to all parties
- Build the stickiness that differentiates you as a distributor





# Issue Tracking Systems



# Lee Sar Customer Service

Customer Contact System- Entry- You are logged in as - SCHROEDER,JEFF - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Address <http://www.leesar.com/cgi-bin/olecgi.exe/crs001> Go

**LEE SAR**  
REGIONAL SERVICE CENTER

**Customer Contact System- Entry**

Requests Inquiry Help/Docs Log Out Website Links

Leesar CRS is only monitored from 7 a.m. to 4 p.m.  
**Please fill in Request Form below :**  
Required information is **highlighted**.  
Please note: You can change your customer information if it is not correct and it will update our database.

**Request#** 004064      **Entry Date** 03/07/2005      **Open**

**Customer Name** LEESAR FLEET  
Jeff Schroeder

**Phone** 239-303-3420      **Ext.**

**FAX#**

**Department** DISPATCHER

**Email** jschroeder@leesar.com

**Contact Type**  Inquiry  Praise  Complaint  Transfer

**Contact Category** Distribution\Delivery

**Priority** Low

**Status** OPEN

**Date Required** 03/07/2005

**Leesar Department** ADMINISTRATION

**Assigned To** All Employees

**Description of Issue:**

- IDN – Integrated/ Independent Delivery Network

## ■ Contact Type

- Inquiry
- Praise
- Complaint
- Transfer

## ■ Contact Category

- Shortage-Supplies
- STAT-Courier
- Product-Stock Inquiry
- Shipping
- Receiving
- Distribution\Delivery
- STAT-Supplies
- Invoice Inquiry
- Human Resources
- Customer Service
- Vendor PO Questions
- RMA Inquiry/Request
- Medical Records

- *Visibility for Hospitals into the complete supply chain.*

# WeeksLerman Group

**Printer Friendly Version**

**THE WEEKS LERMAN GROUP** *Customer Reporting System - Update*

**Request#** 000821 **Entry Date** 01/12/05 **Updated** 01/12/05 **Open**

**Customer Contact** Sammut Group  
**Phone** CHRISTINA CRUZ  
**Phone Ext.**  
**Fax**  
**Email** CRUZ@WEEKSLERMAN.COM

**Request/Problem** Problem  
**Severity** High  
**Status** Research  
**Date Required** 01/12/05  
**Department** 1  
**Date Promised**  
**Assigned To** Pierre@weekslerman.com

**Description of Problem:**  
On p/t 01465980001, the merchandise was sent UPS to the customer with no packing material. The items of which some were cans of Lysol opened and sprayed the rest of the merchandise. When the customer recieved the box he refused it because he could smell the Lysol. I will be bringing the box and paper work out to you.

**Special Instructions:**

**Comments:**

| Date     | Init | Comment  |
|----------|------|--|
| 01/12/05 | P    | Resolution Field Updated - @ 05:26:48pm  |
| 01/12/05 | P    | I've repicked/repacked the order and it's on the UPS truck to be delivered. - @ 05:26:48pm |

- Largest Independent Office Products Dealer in NY
- Departments are Automatically Alerted to open requests via Email
- Management is carbon copied on all requests
- Requests Range from: Delivery Issues to purchasing requests for specialty items

# Helby Import Company

- Importer/Distributor of Beads and Stringing Material
- Large amount of Credit Card billing
- Credit Dept has a centralized Customer Touch Point
- Customer and Management Alerted to open requests via Email
- Allows Global customer access overseas customers can update tickets in their time zone
- Requests Range from: Sales Quotes, Product Questions to Billing Disputes and resolution.

Printer Friendly Version

**the BEADSMITH**  
A DIVISION OF HELBY IMPORT COMPANY

**Customer Reporting System - Update**

Request# 013018    Entry Date 04/19/07    Updated 04/30/07    Open

**Customer Contact**    The Beadsmith  
GRACE

**Phone**

**Phone Ext.**

**Fax**

**Email**    GRACE@HELBY.COM

**Mod/Problem**    Problem

**Severity**    Low

**Status**    Mgr Review

**Quote Required**    No

**Customer Priority**

**Date Required**    04/19/07

**Department**    ADMIN

**Menu Path**

**System Area**    Accounts Receivable

**Date Promised**    04/19/07

**Assigned To**    David T

**Description of Problem:**  
C.C.DEC.# 150869 VISA..6012  
\$ 5.49 ORDER SHIPPED

**Special Instructions:**

**Comments:**

| Date     | Init | Comment  |
|----------|------|--|
| 04/19/07 | DT   | - @ 11:48:06am   |
| 04/20/07 | DT   | cc declined again. - @ 09:42:50am                              |
| 04/23/07 | DT   | CC DECLINED AGAIN. - @ 12:05:57pm                              |
| 04/24/07 | DT   | CC DECLINED - @ 04:17:21pm                                     |
| 04/25/07 | DT   | cc declined again; e-mailed. - @ 09:19:58am                    |
| 04/26/07 | DT   | CC DECLINED - @ 02:07:17pm                                     |
| 04/27/07 | DT   | CC DECLINED AGAIN/E-MAILED REQ UPDATED CC INFO. - @ 10:00:36am |
| 04/30/07 | DT   | cc declined - @ 09:33:43am                                     |

**Resolution:**

**Completion Date**    By

**Attached File**

start    C:\Documents and Se...    2 Microsoft Office P...    Internet Explorer    10:34 PM





# Customer facing information

- You control what the customer sees
- Each view gets tagged to provide a end to end view of the life of an issue
- No more dropped issues or finger pointing





# Build Knowledge

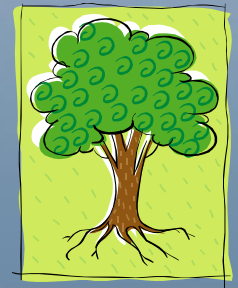


- Google it!!!
- Document resolutions and processes to create the database
- Establish metrics and review them





# Root Cause



## ■ **Benefits Of The 5 Whys**

- Help identify the root cause of a problem.
- Determine the relationship between different root causes of a problem.
- One of the simplest tools; easy to complete without statistical analysis.

# Complete The 5 Whys



- 1.** Write down the specific problem. Writing the issue helps you formalize the problem and describe it completely. It also helps a team focus on the same problem.
- 2.** Ask Why the problem happens and write the answer down below the problem.
- 3.** If the answer you just provided doesn't identify the root cause of the problem that you wrote down in step 1, ask Why again and write that answer down.
- 4.** Loop back to step 3 until the team is in agreement that the problem's root cause is identified.

Again, this may take fewer or more times than five Whys.

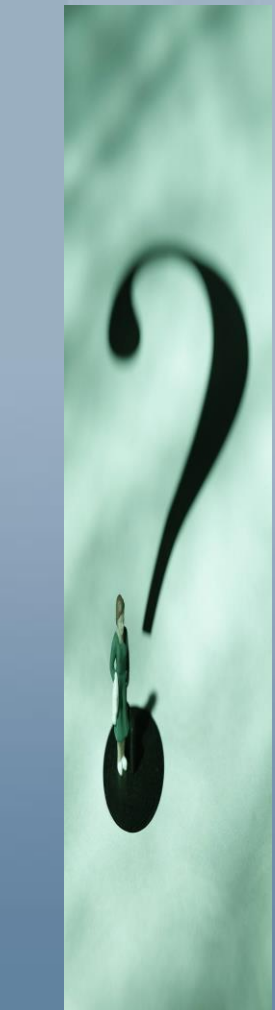
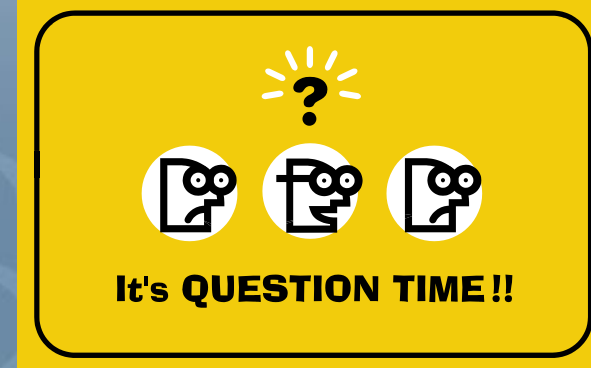


# Learn to Ask Questions

- "If you don't ask the right questions, you don't get the right answers. A question asked in the right way often points to its own answer. Asking questions is the ABC of diagnosis. Only the inquiring mind solves problems."

-- Edward Hodnett

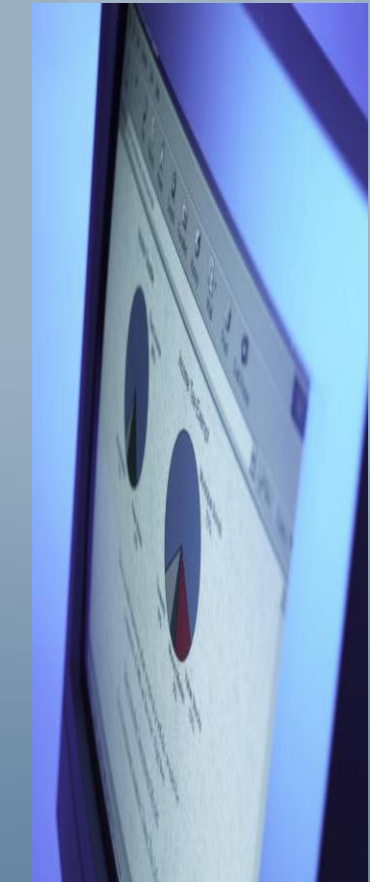
-[www.isixsigma.com](http://www.isixsigma.com)





# Reporting Metrics and Alerts

- Build customized alerts
- Customer Calls per month/day
- Product Calls per month/day
- Returns analysis
- Shipping analysis
- Payment analysis



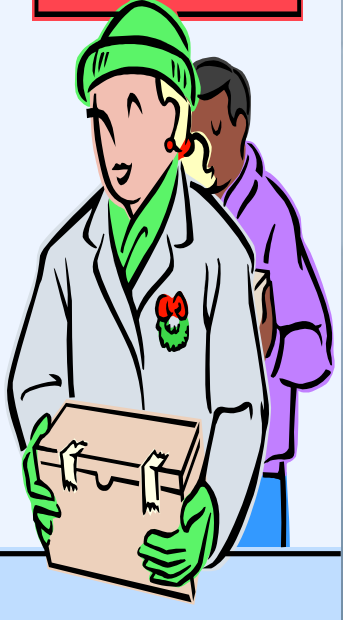
- What are your metrics?



# Web Based RMA System

- According to Gartner, automating your reverse logistics with a Web interface that demands a RMA and compliant label before any return would save you 50-70 percent over a live call center.
- Gartner further notes that if you set up an entirely Web-based RMA system that links directly to your ERP, your company could save 50-80 percent over pre-printed return labels.

**RETURNS**





# Automating *Front End* -- Customer Interface ROI

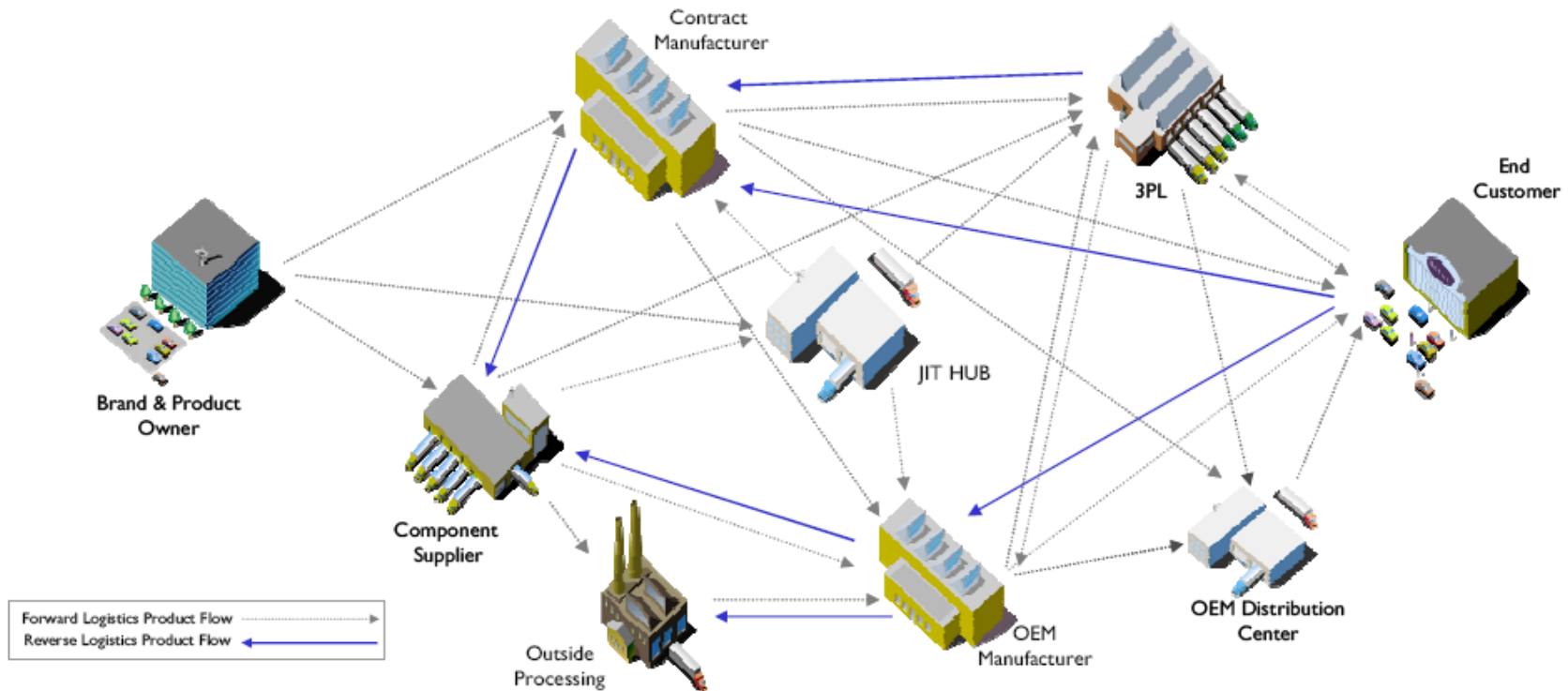
- Online Return Template vs Call Center 50-75%
- Business rules + original order info vs. Manual Process 50-80%
- Web RMA /shipping + label vs. pre-printed 50-80%
- Carrier pickup & return routing 25-50%
- Email messaging of customer/ vendor status vs. manual process 25-50%



*Source: Gartner Research*

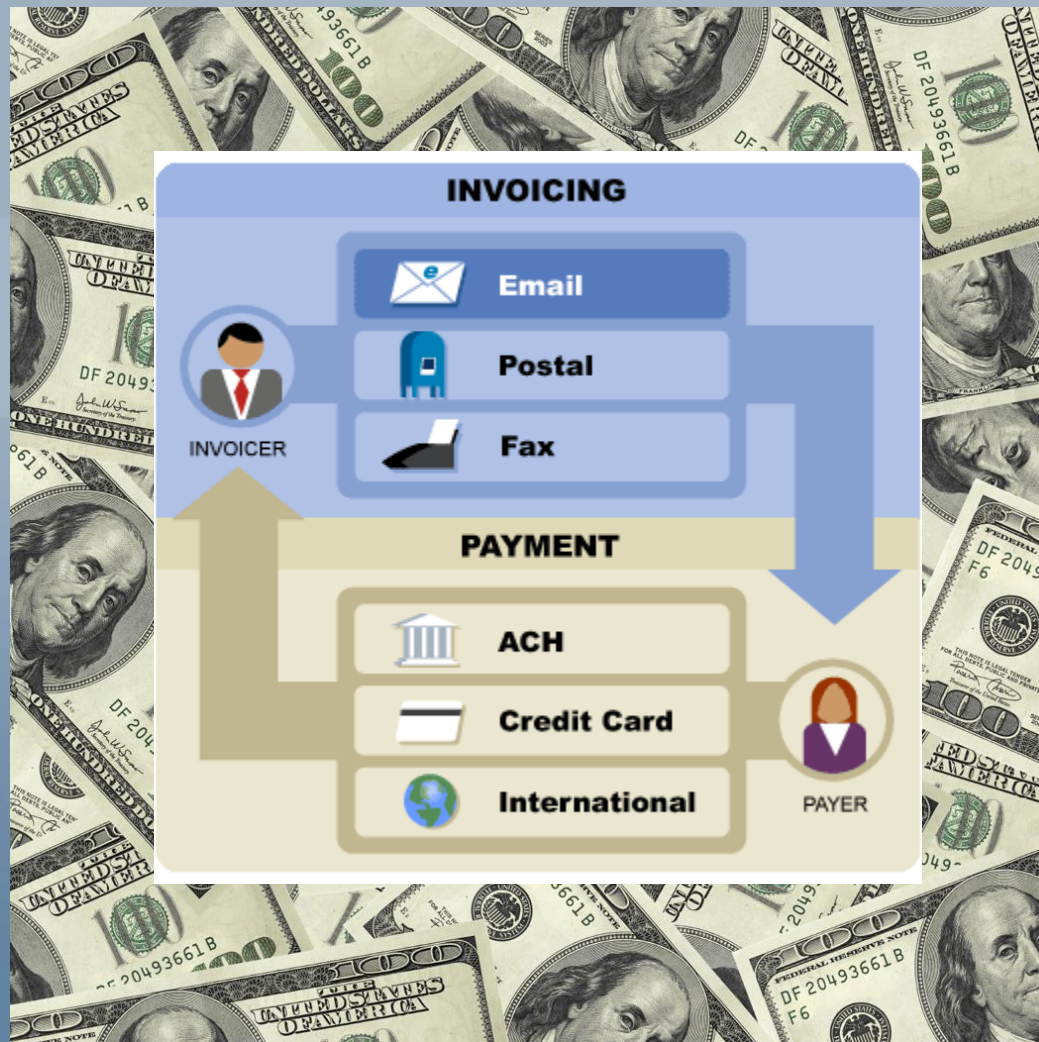


# Web ERM – Reverse Logistics



*ClearOrbit allows companies to optimize execution across their extended supply network, improving speed, visibility and control through collaborative processes. Enterprise returns management is an important component of a comprehensive approach that should be integrated with forward processes.*

# Web based Payment Systems



# Virtual Payment Portal

Transcepta Invoicer Portal - Windows Internet Explorer

https://supplier1.transcepta.com/TransceptaSolution/SupplierPortal/ViewInvoices.aspx

File Edit View Favorites Tools Help

Transcepta - Partners - Transcepta Invoicer Portal

web based returns management

**transcepta™** Invoices & Electronic Payments

**Invoicer Portal** David Fertig [sign out](#)

**View Invoices** AddressBook Administration

**Invoice Search Criteria**

Invoice Profile:  Document Type:

Customer Number:  Number:

Customer Name:  Date Range:  -

Your Sales Order Number:  Balance Due Range:  -

Customer Purchase Order:  Status:

Click on a document number to view details or change the status.

| Document Type | Number                | Date     | Customer Number               | Customer Name                           | Balance Due | Status | Your Sales Order | Customer Purch Order | Test Invoice                        |
|---------------|-----------------------|----------|-------------------------------|---|-------------|--------|------------------|----------------------|-------------------------------------|
| Invoice       | <a href="#">31416</a> | 2/6/2007 | UNIVERSALMARINEMEDICALATTDANA | HARRISSUPPLYCOPOBOX19<br>MARINE MEDICAL | \$45.00     | Open   |                  |                      | <input checked="" type="checkbox"/> |

Copyright ©2006 Transcepta, LLC

[Transcepta Home Page](#) [Support](#) [Privacy](#)

All rights reserved.

https://supplier1.transcepta.com/TransceptaSolution/SupplierPortal/Administration.aspx

Internet 100%

# Web Based Collaboration tools



# Online Collaboration tools

Inter-Tel Web Conferencing/Remote Support - Windows Internet Explorer

http://linkivity.tshinc.com/

File Edit View Favorites Tools Help

Inter-Tel Web Conferencing/Remote Support

**INTER-TEL**

LOGON

System Tools

- TEST BROWSER
- PUBLIC AREA
- USER GUIDE

Powered by Linkivity

Tue May 1 18:25:35 EDT 2007  
Version V4.50.0037

Inter-Tel  
Web Collaboration  
and  
eSupport Solution

Done

GoToMeeting : Web conferencing, Online Meetings, Net Meeting, Online Training, Web Conference, - Windows Internet Explorer

https://www.gotomeeting.com/en\_US/entry/entry.tmpl

File Edit View Favorites Tools Help

GoToMeeting : Web conferencing, Online Meetings, N...

**GoToMeeting**

- Log In
- Home
- Product Overview
- How it Works
- Free Trial
- Buy Now
- Pricing
- About Us
- Newsroom
- Support

Winner of PC Magazine Editors' Choice Award  
2 Years Running

**Easy Online Meetings - Any**

Save time and money with the easiest-to-use GoToMeeting. You can present, demonstrate for one low flat fee. [Try it free](#) and discover the benefits of conferencing to:

- Give Sales Presentations and Product Demos
- Meet and Collaborate across the Globe
- Provide Online Training

[Start a Free Trial of GoToMeeting.](#)

Need Webinars and capacity for 1,000+ participants? [GoToWebinar.](#)

2005 FROST & SULLIVAN Best New Service Award

PC MAGAZINE EDITORS' CHOICE

Frost & Sullivan  
Best New Service Award Winner

[Read More](#)

More Web-based Solutions from Citrix Online

- [GoToWebinar™: Web Events Made Easy™](#)
- [GoToMyPC®: Access Your PC From Anywhere](#)

Done

WebEx: Web Conferencing & Meetings, Video Conference, Net Meeting, Webinar Solutions - Windows Internet Explorer

http://www.webex.com/

File Edit View Favorites Tools Help

WebEx: Web Conferencing & Meetings, Video Confer...

USA (Change) Support Partners Buy Contact Sales Search

Host Meeting Attend Meeting

Individual Small & Medium Large Business Company Info Partners Support Services Communities

**Free Trial**

**View Demo**  
now in progress

**Buy WebEx**

**Accelerate results in every area.**  
**Marketing. Sales. Training. Support.**

It's easy with WebEx.  
Try it **Free** for 14 days.

**Individual Professionals**  
Get easy solutions priced right for single users.

**Small & Medium Business**  
Find specialized solutions for your department or entire company.

**Large Business & Enterprise**  
Standardize on the #1 on-demand collaboration platform.

[Enter Site](#) [Enter Site](#) [Enter Site](#)

**The Latest** WebEx Honored with Supplier of the Year Award from Boeing

**What is a web meeting?**  
Curious about meeting online but don't know where to begin? Start with this quick intro--and you'll quickly see why more than 5.5 million people use WebEx every month.

**WebEx Customers**  
Host a meeting  
Attend a meeting  
Log in to your MyResources portal  
Visit the WebEx User community  
Get tech support  
[Get free online training](#)

**Featured Webinar**  
2007 WebEx Experience Online Forum  
6 days, 25 sessions.  
All sessions hosted online - no cost to attend.  
Begins: **May 15, 2007**

**Popular Links**

- What size is your business?
- Web Conferencing
- Download WebEx player
- View activity map
- View meeting video
- Partner with WebEx
- Learn about WebEx Connect
- Come work at WebEx
- [View all solutions >](#)

Done

# IM/Text based chat

Live chat software, Live support, Chat software, Live chat by LivePerson - Windows Internet Explorer

http://www.liveperson.com/sb/ help shopping

File Edit View Favorites Tools Help

Customer Reporting System ... Live chat software, Live s...

Live chat software by **LIVEperson** Search

PRODUCTS & SOLUTIONS // COMPANY // SUPPORT & SERVICES // CONTACTS CUSTOMER LOGIN >

Australian Whites  
California Cabernet  
California Merlot  
California Syrah  
California Zinfandel  
French Bordeaux  
French Burgundy  
French Rhone  
Tuscans Italy  
Other Reds

**QUESTIONS?**  
Chat Online  
Talk by Phone

**Dom Perignon 1995 wine**  
Special Price: \$113.49  
Regular Price: \$139.99  
15% Savings!

To taste Dom Perignon is to and style of a truly great wine stage of vineyard selection cellar...

add to cart

**Talk with an Associate Now!**  
Please enter your information below, and an associate will call you right away.

Your Country: United States (1)  
Your Phone: 2125  
Your Name:   
Call Me Now

click to **Chat Online**

Free Trial

Buy Now

**Small & Midsize Business Solutions**

Features Overview  
Why Choose LivePerson?  
Industries  
Success Stories

Our chats are **HACKER SAFE**  
Give your customers peace of mind with the certification mark proven to increase conversion rates.

**LivePerson Pro**

**Affordable, award-winning live chat solution**  
Help online visitors find what they need before they get frustrated and leave your site.

- Increase online sales
- Provide customer service
- Reduce operating costs

[Learn More!](#) > [View Demo](#) > [Schedule Demo](#) >

**LivePerson Contact Center**

**Cost-effective, complete contact center solution**  
Make it easy for your visitors to contact you, and for your contact center to keep track of their requests.

- Live chat, click-to-talk, email management and FAQ/knowledgebase
- Improve productivity
- Provide better customer service

[Learn More!](#) > [Request Demo](#) >

Done Internet 100%



# Supply chain visibility

Supply chain visibility is a firm's ability to collect and analyze distributed data, generate specific recommendations, and match insights to strategy



# Web Based ERP Inquiries

Orders On Hold - Windows Internet Explorer

http://www.lee-sar.com/cgi-bin/olecgi.exe/login797

LEE SAR

Orders on Hold

About Online Ordering Change Password Place an Order Inquiries Help Contact Us Log-Out

Inventory Inquiry  
Cust/Item Price Inquiry  
Product History  
Accounts Receivable  
Order Inquiry  
Open Orders  
Backorders  
Customer Contract

Mr. Sy Fertig

You may click on the number listed below to resume your order or

You may use the menu bar to place a new order or to inquire the system

Sort By: Web Login ID GO

Items per page: 10 GO

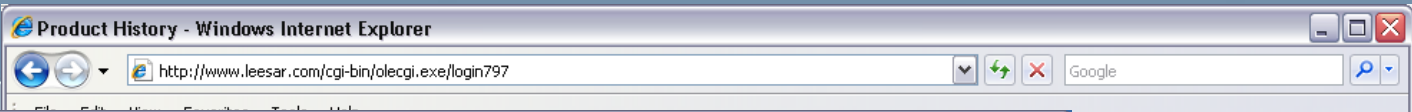
| Web Order# | Web Login ID | Customer PO | Ordered By | Order Date | Order Amt | Status  |
|------------|--------------|-------------|------------|------------|-----------|---|
| 0 Item     |              | 0 Page      |            |            |           | <a href="#">Previous</a> <a href="#">Next</a> |

Copyright © 2007 The Systems House, Inc.  
[Problems? Click here to email the Webmaster](#)

- Inventory Inquiry
- Cust/Item Price Inquiry
- Product History
- Accounts Receivable
- Order Inquiry
- Open Orders
- Backorders
- Customer Contract

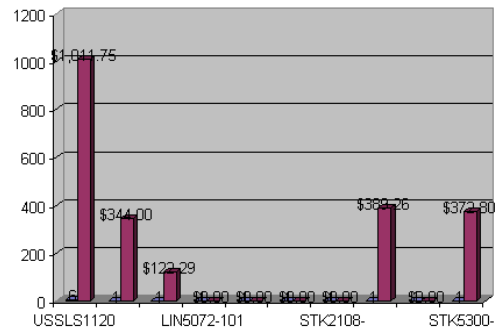


# Usage Information



Microsoft Excel - LEESAR\_XSS008711.xls

| Product No. | Cust Item#         | Product Description                        | Dec | Jan | Feb | Mar | Apr | May | Avg Usage | Total | YTD | Sell U/M | Last Price | Last U/M | Prc Qty | Tot |
|-------------|--------------------|--|-----|-----|-----|-----|-----|-----|-----------|-------|-----|----------|------------|----------|---------|-----|
| 1           | USLS1120           | **USE USLS1020** *LIGASURE, SHORT. ATLAS.: | 0   | 3   | 0   | 0   | 0   | 0   | 0         | 0     | 3   | EA       | \$337.25   | EA       |         | 6   |
| 2           | COKNTSE-030115-UDH | *BASKET NITINOL EXTRACT 3F                 | 0   | 0   | 2   | 0   | 0   | 0   | 0         | 0     | 2   | EA       | \$172.00   | EA       |         | 1   |
| 3           | ALOGU6385          | *BASKET P/S 11 W/O TIP                     | 0   | 0   | 1   | 0   | 0   | 0   | 0         | 0     | 1   | EA       | \$122.29   | EA       |         | 1   |
| 4           | LIN5072-101        | *BLADE STK(19.5X1.27X86MM)                 | 0   | 0   | 0   | 0   | 0   | 0   | 0         | 0     | 0   | EA       | \$58.58    | EA       |         | 1   |
| 5           | STK2108-109-000    | *BLADE SAG. 21MMX.89MM                     | 0   | 0   | 0   | 0   | 0   | 0   | 0         | 0     | 0   | EA       | \$22.37    | EA       |         | 1   |
| 6           | STK2108-105-000    | *BLADE SAG. 25MMX.89MM                     | 0   | 0   | 0   | 0   | 0   | 0   | 0         | 0     | 0   | EA       | \$22.37    | EA       |         | 1   |
| 7           | STK2108-160-000    | *BLADE SAG. 25MMX.89MM                     | 0   | 0   | 0   | 0   | 0   | 0   | 0         | 0     | 0   | EA       | \$22.52    | EA       |         | 1   |
| 8           | BOS390-101         | *BSKT.OTIP.NITINOL.2.4FR.120CM             | 0   | 0   | 1   | 1   | 0   | 0   | 0         | 0     | 2   | EA       | \$194.63   | EA       |         | 1   |
| 9           | BOS330-106         | *BSKT.GEML.3FR.120CM.OTIP.3WIRE            | 0   | 0   | 0   | 0   | 0   | 0   | 0         | 0     | 0   | EA       | \$187.39   | EA       |         | 1   |
| 10          | STK5300-020-901    | *BUR                                       |     |     |     |     |     |     |           |       | 20  | EA       | \$18.64    | EA       |         | 1   |
| 11          | STK5300-010-903    | *BUR                                       |     |     |     |     |     |     |           |       | 15  | EA       | \$10.38    | EA       |         | 1   |
| 12          | STK5300-010-901    | *BUR                                       |     |     |     |     |     |     |           |       | 20  | EA       | \$10.38    | EA       |         | 1   |
| 13          | BOS220-103         | *CAT                                       |     |     |     |     |     |     |           |       | 1   | EA       | \$138.98   | EA       |         | 1   |
| 14          | BOS220-104         | *CAT                                       |     |     |     |     |     |     |           |       | 1   | EA       | \$138.98   | EA       |         | 1   |
| 15          | STR105108          | *DES                                       |     |     |     |     |     |     |           |       | 0   | GL       | \$65.82    | CS       |         | 4   |
| 16          | MIC4609            | *DRE                                       |     |     |     |     |     |     |           |       | 20  | EA       | \$95.85    | CS       |         | 20  |
| 17          | STK5300-010-071    | *DRIL                                      |     |     |     |     |     |     |           |       | 15  | EA       | \$19.97    | EA       |         | 1   |
| 18          | COK635497          | *GAW                                       |     |     |     |     |     |     |           |       | 4   | EA       | \$18.79    | EA       |         | 1   |
| 19          | ALSSM74000         | *HAL                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$207.68   | CS       |         | 10  |
| 20          | BOS15-101          | *INF                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$164.50   | BX       |         | 5   |
| 21          | BOS820-100         | *KIT                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$790.76   | EA       |         | 1   |
| 22          | DAV0010201         | *MES                                       |     |     |     |     |     |     |           |       | 0   | EA       | (\$515.46) | EA       |         | 2   |
| 23          | MISC               | *MIS                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$59.12    | EA       |         | 1   |
| 24          | STKE0620-030-600   | *PLU                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$31.84    | EA       |         | 10  |
| 25          | BOS260-120         | *SET                                       |     |     |     |     |     |     |           |       | 4   | EA       | \$41.22    | EA       |         | 1   |
| 26          | CDMCO81-1011       | *SPO                                       |     |     |     |     |     |     |           |       | 50  | PK       | \$321.63   | CS       |         | 50  |
| 27          | BOS145-372         | *STE                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$124.61   | EA       |         | 1   |
| 28          | BOS145-381         | *STE                                       |     |     |     |     |     |     |           |       | 0   | EA       | \$124.61   | EA       |         | 1   |
| 29          | BOS175-254         | *STENT.PERCUFLEX.PL.4.8/20 W/O GW          |     |     |     |     |     |     |           |       | 0   | EA       | \$106.50   | EA       |         | 1   |
| 30          | BOS175-271         | *STENT.PERCUFLEX.PL.7X22 W/O GW            |     |     | 2   | 0   | 0   | 0   | 0         | 0     | 2   | EA       | \$106.50   | EA       |         | 1   |
| 31          | BOS175-252         | *STENT.PERCUFLEX.PL.4.8/24                 |     |     | 0   | 0   | 0   | 0   | 0         | 0     | 0   | EA       | \$106.50   | EA       |         | 1   |
| 32          | ALL23657-044       | *STOCKINETTE 4" STERILE                    | 36  | 0   | 0   | 0   | 0   | 0   | 0         | 0     | 36  | EA       | \$63.06    | CS       |         | 36  |
| 33          | ETCETR830H         | *SU.ETHL.1.CTX.30IN.36/BX                  | 0   | 0   | 2   | 0   | 0   | 0   | 0         | 0     | 2   | BX       | \$60.84    | BX       |         | 1   |
| 34          | ETCETRA424H        | *SU.MERS.0.CT-1.30IN.GRN.36/BX             | 0   | 0   | 1   | 0   | 0   | 0   | 0         | 0     | 1   | BX       | \$72.68    | BX       |         | 1   |
| 35          | ETCETR665H         | *SU.MERS.2-0.F.18IN.WHT.36/BX              | 0   | 0   | 1   | 0   | 0   | 0   | 0         | 0     | 1   | BX       | \$73.23    | BX       |         | 1   |
| 36          | ETCETRS21          | *SU.MERSILENE.12IN.6/BX                    | 0   | 0   | 1   | 0   | 0   | 0   | 0         | 0     | 1   | BX       | \$190.16   | BX       |         | 1   |
| 37          | ETCETM8709         | *SU.PRO.6-0.BV-1.30IN.BL.12/BX             | 0   | 0   | 1   | 0   | 0   | 0   | 0         | 0     | 1   | BX       | \$443.40   | BX       |         | 1   |
| 38          | ETCETM8776         | *SU.PRO.6-0.BV.30IN.BL. MONO.12/BX         | 0   | 0   | 1   | 0   | 0   | 0   | 0         | 0     | 1   | BX       | \$436.71   | BX       |         | 1   |



## Product History

to Excel.  
Excel.

| Last Price | Last Prc UM Qty | Total Expend. |
|------------|-----------------|---------------|
| \$290.75   | PR 200          | \$0.00        |
| \$70.93    | 1               | \$0.00        |
| \$157.90   | EA 5            | \$0.00        |
| \$115.02   | 1               | \$0.00        |
| \$2,651.85 | EA 6            | \$42,871.64   |
| \$438.85   | EA 1            | \$0.00        |
| \$275.95   | EA 5            | \$0.00        |
| \$6.10     | 1               | \$0.00        |
| \$4.89     | EA 1            | \$0.00        |
| \$5.99     | 1               | \$0.00        |

4 5 6 7 8 9 10 Next



# Product Contract Search

Product Contract Search - Windows Internet Explorer

http://www.lesar.com/cgi-bin/olecgi.exe/login797

File Edit View Favorites Tools Help

Product Contract Search

**LEE SAR** *Product Contract Search*

About Online Ordering Change Password Place an Order Inquiries Help Contact Us Log-Out

Web Order # 008711 Customer PO# None Ship to OR-SPD FT MYERS, FL 33901

Enter your search criteria and click on Search. Click here to view [Search Tips](#)

Product Code:

Product Description:

Vendor:

Vendor Part#:

Manufacturer:

Manufacturer Part#:

Customer Item#:

If you wish to use a Custom Template choose one or Please select your preferred order entry method:

Choose a template:

Product Contract Search Results

der Inquiries Help Contact Us Log-Out

Ship to OR-SPD FT MYERS, FL 33901

Save as Default

Save as Default

| Order Name  | Start Date | End Date | UN Price            | PD UM         | RB QOE | Qty      |
|---|------------|----------|---------------------|---------------|--------|----------|
| Order Item#   |            |          |                     |               |        |          |
| ELL PERRY, INC<br><a href="#">5721313</a><br>19480        | 0          |          | \$290.75<br>\$1.45  | N<br>CS<br>PR | N<br>N | 200<br>1 |
| DINAL HEALTH MEDICAL<br><a href="#">NITRILE LARGE</a>     | 0          |          | \$260.05<br>\$13.00 | N<br>CS<br>PK | N<br>N | 20<br>1  |
| DALL HEALTHCARE   | 10/01/06   | 05/31/09 | \$27.20<br>\$1.36   | CS<br>EA      | Y<br>Y | 20<br>1  |
| DINAL HEALTH MEDICAL<br><a href="#">NITRILE LARGE</a>     | 0          |          | \$146.38<br>\$2.93  | N<br>CS<br>EA | N<br>N | 50<br>1  |
| HS MEDICAL ASD, INC<br><a href="#">R CAL LOOP FLAT GL</a> | 0          |          | \$87.33<br>\$0.87   | N<br>CS<br>EA | N<br>N | 100<br>1 |
| DALL HEALTHCARE<br>13580                                  | 0          |          | \$80.51<br>\$20.13  | N<br>CS<br>EA | N<br>N | 4<br>1   |
| IONS PRESTON  | 0          |          | \$5.58<br>\$5.58    | N<br>EA       | N<br>N | 1<br>1   |
| SAM<br><a href="#">SAMA571213</a><br>SAMA571213           | 0          |          | \$5.58<br>\$5.58    | N<br>EA       | N<br>N | 1<br>1   |
| SAM<br>SAMMONS PRESTON                                    |            |          |                     | N<br>N        | N<br>N |          |

# Vendor Purchases

The screenshot shows a multi-window browser view of the CDW vendor portal. The windows are:

- CDW@work - Your personalized home page:** Shows the CDW logo, navigation tabs (Brands, Hardware, Software, Net), a left sidebar with navigation links, and a main content area with a welcome message for David Fertig and account information for Eric Blumberg.
- My Purchases: Report Results:** Shows a 'My Orders' section with a 'Report Results' link and a table of orders.
- My Purchases: Order Details:** Shows detailed information for order GCG1685, including order information, billing address, shipping address, and a product table.

**Order Details Summary:**

- Order #: GCG1685**
- Status:** [All Items Shipped]
- Order Date:** 4/20/2007
- PO #:** 7874
- Customer #:** 1495601
- Purchaser:** MARY LOU VERGARA
- Invoice List:** FGB0400
- Billed From Address:** CDW Inc, 200 N. Milwaukee Ave, Vernon Hills, IL 60061, (800) 800-4239
- Shipping Address:** THE SYSTEMS HOUSE, INC, 1033 US HIGHWAY 46, CLIFTON, NJ 07013-2429
- Billing Address:** THE SYSTEMS HOUSE, INC, ATTN: ACCTS PAYABLE, 1033 US HIGHWAY 46, CLIFTON, NJ 07013-2429, (973) 777-8050
- Payment Method:** American Express
- Shipping Method:** Drop Ship Ground

**Product Table:**

| Product                                | Contract | CDW    | Mfg Part # | Qty | Price    | Ext. Price |
|--|----------|--------|------------|-----|----------|------------|
| WatchGuard 1 Year LiveSecurity Renewal |          | 577873 | WG017072   | 1   | \$549.99 | \$549.99   |
| <b>Sub-Total:</b>                      |          |        |            |     |          | \$549.99   |
| <b>Shipping:</b>                       |          |        |            |     |          | \$0.00     |
| <b>Total:</b>                          |          |        |            |     |          | \$549.99   |



# Tools Recap



- Tools:
  - Tracking Systems
  - Collaboration Systems
  - Business Process Systems
- Customer Retention Tools

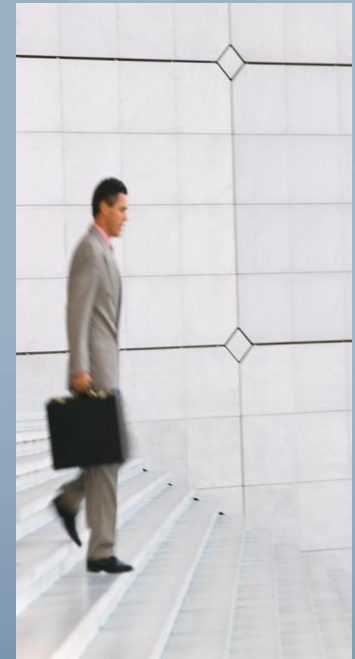




# Next Step



- Examine current practices
- Implement one or all of the tools discussed today
- Survey your client base and see where the needs are
- Measure and correct



vision



Thank You



vision