



**Customer  
Care Tip  
November**

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## **November 2009: Closeout 2009**

By the time you are reading this, it will be late October or early November. The end of the year is rapidly approaching, so now is the time to close out the year on a positive note.

This is a great time of the year to take stock of where we've been and make plans for getting to where we need to be in order to reach our goals.

### **Annual Goal Review**

If you haven't done so recently, or ever, now is a great time to examine distributor goals from the past year and how you performed versus those goals. The Period Comparison report is an excellent place to start to examine performance of two periods of time against each other. If you realize that you are not sure what the goals are, now is the time to ask!

Once you have examined the top line results, you should then determine the underlying causes for any under performance. Option -Based metrics are an excellent aid to develop a drill down look into root causes of issues.

Lastly, once you have figured out where you didn't hit your goals, and why, it is time to change the configuration of the system to improve performance.

### **Suggested Stock Report**

Another good end of year activity is to run the Suggested Stock Report. This report identifies the items in that the distributor knows that you sell that they are not currently stocking yet may be worthy of stocking due to the number of sales that occurred over the past year. The system examines all items with a "D" status, evaluates how many times each sold throughout the year, and for those that had sufficient movement, will recommend they be stocked, at least minimally.

Following the Suggested Stock Report, it is also a good idea to build a Suggested Return with suggested redistribution report. Depending on your returns policy, if you haven't had a return lately, now is a good time to review and remove excess material from distributor's shelves.

### **Plan for Improved Efficiency**

If you haven't already done so, have a "Pre-Collaboration Discussion" with each of your distributors. The structure of the discussion addresses all alerts, so that when you encounter an alert on an order, you will have a predefined course of action to follow. The ideal outcome of this session is to determine which circumstances need input from the distributor, and which can be handled "automatically" with a standard response.

**Of course**, Customer Care stands by ready to help with any of the above items.