



THE KEYS TO CLIENT RETENTION

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WHAT IS YOUR TIME WORTH?

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YOUR TIME = GROSS MARGIN \$ / 2000 HOURS

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WHO IS WORTH YOUR TIME?

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TOOLS TO FOCUS ON

Account Name	Last Order Date	Last Order Goods Billed	2018 YTD-over-2017 YTD Billed Comparison	2016 Goods Billed \$	2017 Goods Billed \$	2017 YTD Goods Billed \$ (1/1-11/12/2017)	2018 YTD Goods Billed \$ (1/1-11/22/2018)	2018 YTD-over-2017 YTD Billed Comparison \$
TOTAL (\$/AVERAGE %)				\$1,024,233.92	\$1,024,666.41	\$833,433.87	\$1,029,526.99	
ABC Company	3/27/18	\$592.43	New	\$0.00	\$0.00	\$0.00	\$17,718.80	\$17,718.80
CDE Company	9/18/18	\$595.00	New	\$0.00	\$0.00	\$0.00	\$595.00	\$595.00
Business 123	9/10/18	\$4,606.64	Trending Up	\$0.00	\$3,873.00	\$3,573.00	\$4,606.64	\$1,033.64
HGI LLC	8/31/18	\$3,861.00	Trending Up	\$3,445.00	\$1,505.38	\$1,505.38	\$13,520.60	\$12,025.12
ABC LLC	4/26/18	\$325.00	Flat	\$883.08	\$996.87	\$0.00	\$1,081.96	\$1,081.96
Right Biz	5/11/18	\$238.50	Flat	\$2,475.82	\$0.00	\$0.00	\$490.26	\$490.26
Jane Corp	9/26/18	\$356.88	Trending Down	\$6,281.32	\$10,123.31	\$5,987.83	\$2,858.31	(\$3,129.37)
Company 136	8/29/18	\$1,650.00	Trending Down	\$8,684.64	\$9,322.22	\$7,832.22	\$5,236.48	(\$2,692.73)

Interactive Planning Guide - Summary by Salesperson

Salesperson	2018 Goods Billed \$	2017 Goods Billed \$	2018 YTD Goods Billed (\$/1-11/22/2018)	2018 Goods Billed %	2017 Goods Billed %	2018 YTD Goods Billed (\$/1-11/22/2018)	2018 Goods Billed \$	2017 Goods Billed \$	2018 YTD Goods Billed (\$/1-11/22/2018)
John Smith	\$1,024,233.92	\$1,024,666.41	\$833,433.87	80.47%	78.47%	41.82%	\$390,942.43	\$405,446.67	\$410,215.13
TOTALS	\$1,024,233.92	\$1,024,666.41	\$833,433.87						

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SET GOALS AND MAKE A PLAN

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db alphabroder | prime LINE®
woven together

BIC graphic | Hit PROMOTIONAL PRODUCTS | Showdown DISPLAY | SWEDA

Gemline | Zpcna | S&S | HUB promotional Group | The Magnet Group | SANMAR | Logomark

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ALL IN

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KEEP TRACK

REPORT DASHBOARD INCOME OUT GOING

- Who's Trending Up?
- Who's Trending Down?
- Who's Flat?
- Who's Inactive?

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FIND A COMMUNITY



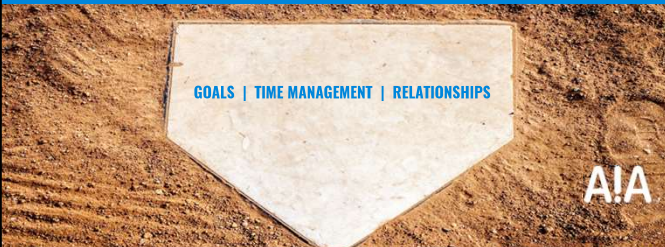
- Commiserate
- Celebrate
- Someone to talk to
- Build a plan

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BRINGING IT HOME



GOALS | TIME MANAGEMENT | RELATIONSHIPS

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QUESTIONS?



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