

A group of business professionals in a meeting, with a blue overlay containing text. The background shows several people looking at a whiteboard with a line graph. A hand is visible holding a blue marker, pointing at the graph. The text is centered on the blue overlay.

10 STEPS TO A WORLD CLASS INVENTORY TEAM



CATALYST
UNRIVALED RESULTS



UNRIVALED INVENTORY RESULTS

OUR VISION FOR YOU

A team of **Inventory Investment** professionals

approaching each day with a **business owner mindset**

delivering **world class service** and strong, **sustainable profit**

while freeing up **cash** for business opportunities

all while becoming the **trusted, go-to team** of the organization



THE FORMULA

FINANCE

COMMUNICATION

ANALYTICS

TEAM DEVELOPMENT

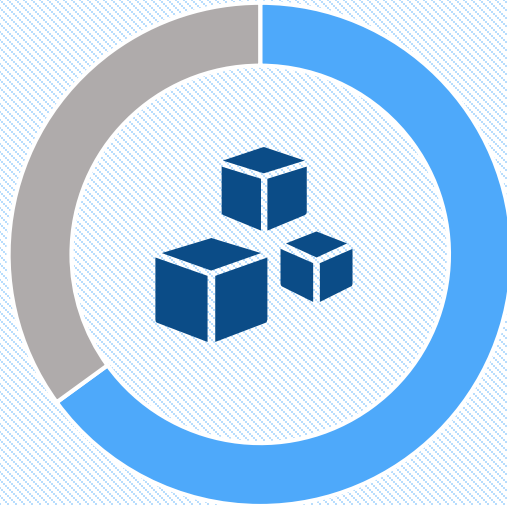
TEAM EXECUTION

CHAMPION

HIRING EXCELLENCE

POSITIONING YOUR SOLUTION

Operational Software? OR Profit Boosting Program?



OPERATIONS

If viewed and positioned as Operational Software, you will see base level results, then likely move the talent on to project #12. Profit, cash and service revenue will be left on the table with this approach.



PROFIT

When the program is positioned and aligned to impact your Income Statement, the talent you choose, the time you invest and the focus on results pays immediate and long term dividends. This attitude wins and needs to start at the top.

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2&3

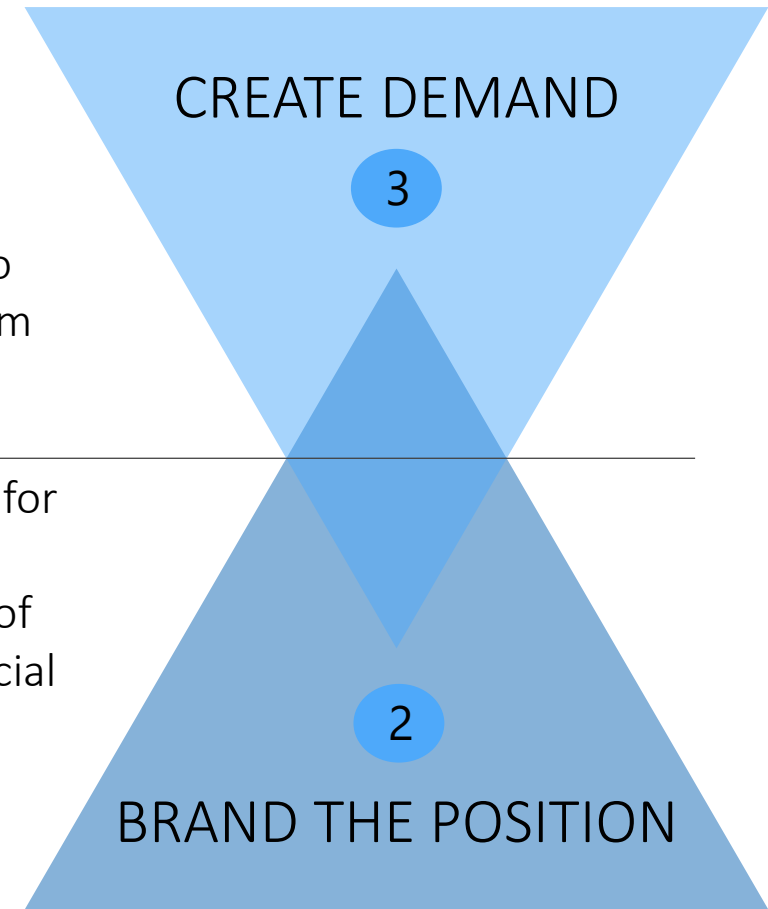
HIRING EXCELLENCE

Make the position a career destination

HIRING RIGHT
IS A 2-STEP
FORMULA

CREATE DEMAND: With the new level expectations and importance, reach out to find the blend of talent and professionalism that will shape the image of the team.

BRAND THE POSITION: Before advertising for the role, ensure that the department, position and titles reflect the importance of the career at your company and the financial impact expected.



2&3



Visit our
HIRING GUIDE

HIRING EXCELLENCE

Move from panic-hiring to planning ahead of the need

2

BRAND THE POSITION



OLD:

PURCHASING, RE-BUYER
PROCUREMENT

NEW:

INVENTORY PLANNING
INVENTORY INVESTMENT TEAM
INVENTORY ANALYSTS

3

CREATE DEMAND



RECRUIT WITH:

AN APPEALING AD, A PROFESSIONAL HIRE
PARTNER WITH COLLEGES & GROUPS

THEY ARE LOOKING FOR:

A HIGH PROFILE DEPT & POSITION
A DEVELOPMENT PLAN
OPPORTUNITY FOR GROWTH

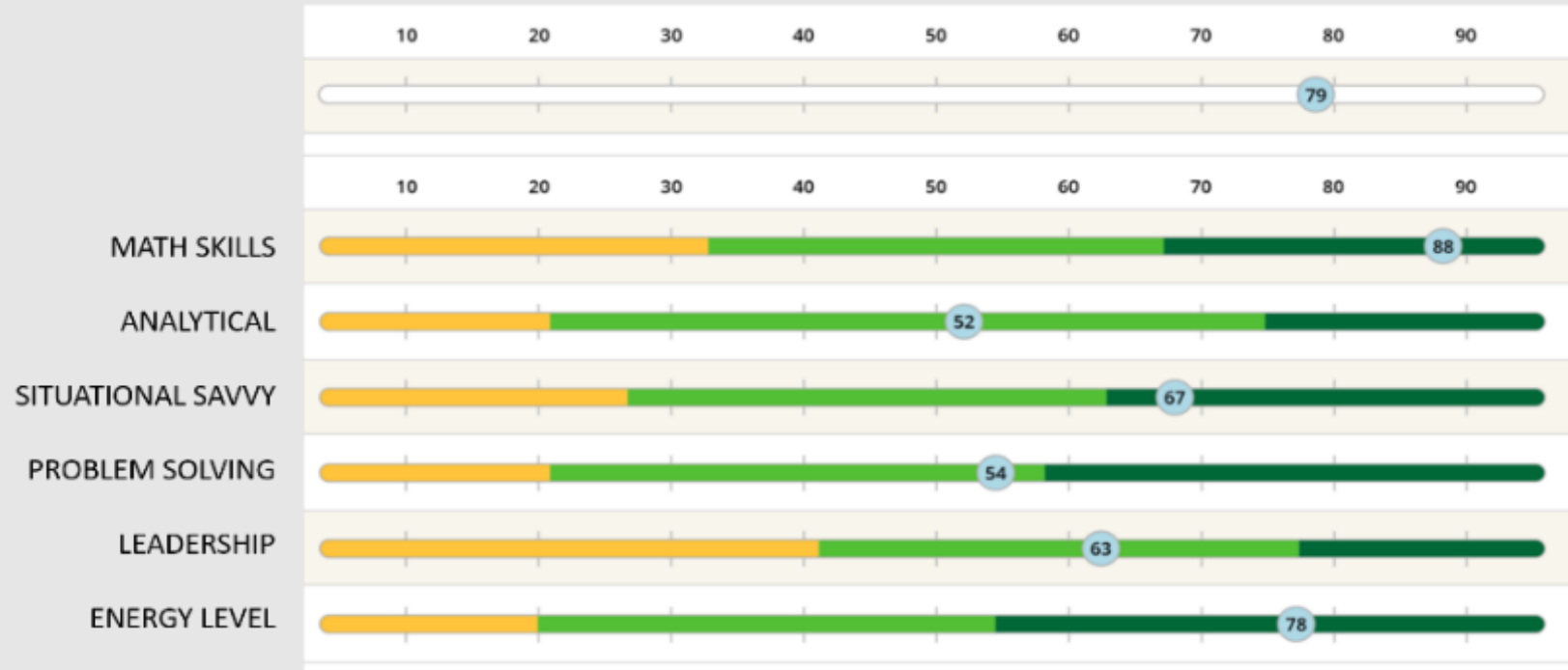
HIRING EXCELLENCE

Create Demand, Filter Smart



INVENTORY HIRING ASSESSMENT.

Offered between the 1st and 2nd interview, the inventory hiring assessment is a key piece to building a world class team.



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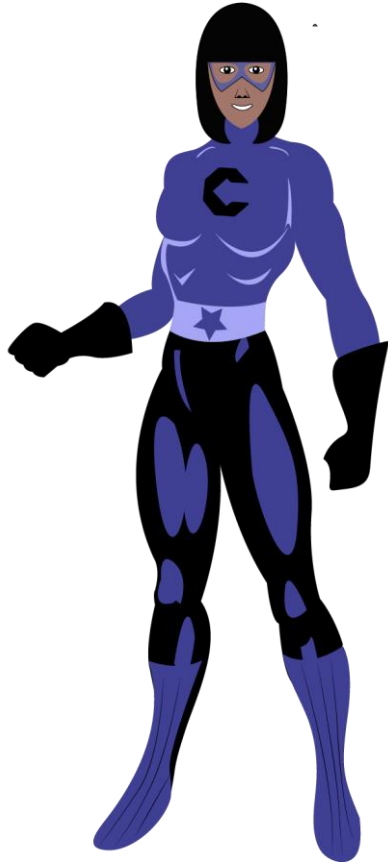
TEAM DEVELOPMENT

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MAKING A CHAMPION



THE CHAMPION POSITION

ALL-STAR ANALYST

Lead first by performing at a high level. Follow the formula for success and continually refine.

COACH, TEAM LEADER

Analysts should be inspired and comfortable to pull their chair to you with a desire to perform at your level



RESULTS

FINANCIALLY SAVVY

Align your inventory goals with the company's goals and perform and measure as an inventory investor. Rethink all KPIs and traditional goals.

BRIDGE BUILDER

A heads-down strong performer is not enough for this role. The champion needs to be motivated to build relationships across the organization and beyond.

CHAMPION'S FOCUS

ANALYST

Set the pace

- Replenishment results
- Strong, smart Setup
- Innovative analytics
- New tools & resources
- Always learning

COACH

Raise everyone's game

- Chairside guidance
- Approachable listener
- Period-end meetings
- Education Sessions
- Strengths-Based Development

FINANCE

Focus on results

- Laser focused on results
- Industry leading service
- Margin expansion
- Deal & Rebate growth
- Inventory expense control

PARTNER

Reach out!

- Establish key partnerships
- Inside & outside
- Communication strategy
- Educate the organization
- Collaborative Analytics

CHAMPION'S CAMP

A three day **intensive** development opportunity

Perform data **discovery**, Stand and **teach**, Provide peer **guidance**

Approach **mastery** of inventory, analytics & people

Build, present & refine your unique 12-month plan that will deliver **results**

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5&6

PREPARATION & EXECUTION

From tactical to strategic

5

TEAM DEVELOPMENT



- › Develop the team into business owners.
- › Balance solution training with professional development.
- › Have each analyst stand & introduce their business
- › Provide guidance for continuous improvement & results

6

BLUE CHIP PRACTICE



- › Remove worn out traditions and install new finance focused goals.
- › Establish best practice guidelines
- › Encourage peer to peer coaching
- › Look outside your company and industry for new approaches
- › Make results visible to the organization

5&6

TEAM DEVELOPMENT

Develop well-rounded inventory professionals



SYSTEM MASTERY

Ongoing solution training
Each analyst should stand & teach
Roundtable training & discussion sessions



LEADERSHIP

Uncommon leaders, The focus on We
Strengths-based teams
Communication skills, All-in customer service
SWOT Strategy planning



PEOPLE

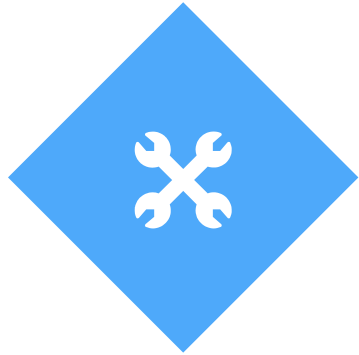
Understanding of personality profiles
Reading and adapting to the styles
Sales for non-sales people
Presentation skills, handling objections



FINANCE

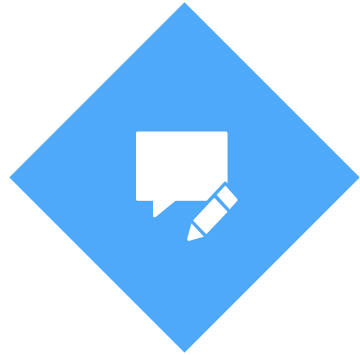
Income Statements & Balance Sheets
Industry specific finance case studies
Inventory Finance
Personal Finance

BLUE CHIP PRACTICES



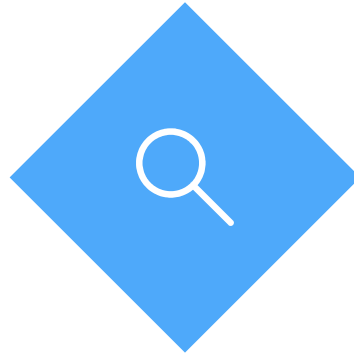
STRONG SET-UP

The victory starts here.
Success is born from
strong, smart set-up of
your lines.



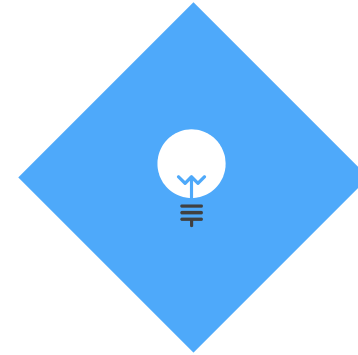
DISCIPLINED DAILY REPLENISHMENT

With strong set-up,
daily replenishment
should be a short and
disciplined portion of
your morning.



TARGETED PERIOD-END REFINEMENT

To ensure continuous
improvement,
perform targeted
refinement through
advanced exceptions
and savvy analytical
tools.



INNOVATIVE ANALYTICS

Great analytics change
everything. They turn
hidden data into clear
stories that inspire
sharp action and
untapped results



OPPORTUNISTIC MARGIN EXPANSION

The days of sitting and
waiting for deals to be
offered are in the past.
Investing in inventory
requires an outreach
to earn undiscovered
deals and profits

BLUE CHIP PERFORMANCE

INCOME STATEMENT IMPACT

BEYOND SERVICE & INVENTORY: The income statement is the report card of today's inventory investment professionals.



SERVICE



PROFIT



INVENTORY



CASHFLOW



MARGIN



PRODUCT MIX



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7&8

COMMUNICATION STRATEGY

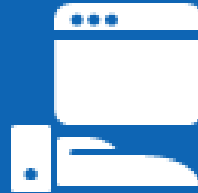
Moving from defense to offense

PROACTIVE



The only way to stop playing defense in our profession is to start playing offense. A strong team with a world class inventory solution will put you on offense with plenty of good news and information to share.

EDUCATION



Raise the Inventory IQ of the entire organization. Take opportunities to educate company leaders. Turn analytics into knowledge that you can push out.

MEETINGS



Create profitable partnerships by reaching out. Your solution will be perform at the highest level as you pull department leaders into your strategy and planning.

INVENTORY ANALYTICS



ANALYTICS

DATA TO STORIES TO ACTION TO RESULTS

INVENTORY ANALYTICS

Keys to a successful inventory analytics program

SELF SERVICE



Chairside analytics means you can go from your ideas and needs to live reports in minutes.

Drag & Drop tools offer today's analyst the chance to perform at a much more profitable level.

Today's analytics are becoming as common and required as yesterday's spreadsheet tools.

FINANCIAL FOCUS

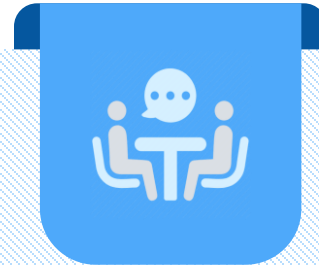


It's to go way beyond service and turns.

Measure and improve the profitability of your inventory.

Follow financial analysts for inspirational designs.

COMMUNITY



Your needs have likely been solved by your consultants and peers.

Your breakthrough idea might be the answer to another inventory analyst's need.

Work in community to learn, share and grow.

ANALYTICS INSPIRE COMMUNICATION

and position you in the center of the organization



EQUIPPING PROFITABLE PARTNERSHIPS



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CREATE A FINANCIAL FOCUS

Return on Inventory Investment



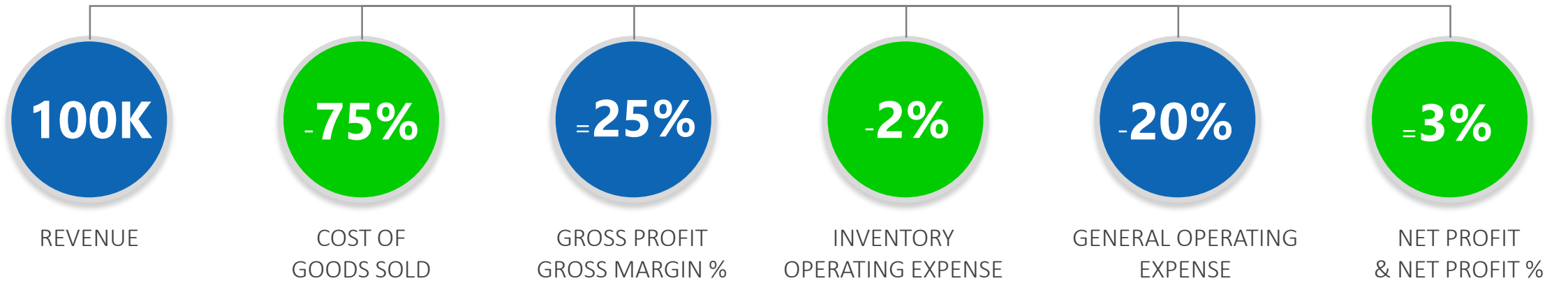
FINANCIAL FOCUS

INVENTORY INVESTMENT PROFESSIONALS DELIVER

Ensure in-stock positions for **Revenue**.
Attack **Cost of Goods**.
Expand **Margins**.
Influence product **Category** decisions.



Minimize **Inventory Operating Expense**.
Impact **Gen Operating Expense**.
Maximize **Profits**.
Free up **Cash** for investments



**AND FINALLY, THE STEP
TOO OFTEN FORGOTTEN**

CELEBRATE VICTORIES

Taking the time to do so will ensure victories happen more often



INVENTORY REDUCTION

33% ↓

SERVICE IMPROVEMENT

2% ↓

NET PROFIT % POINT

1% ↑

10

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BEGIN YOUR JOURNEY

Inventory Planning is a great profession.

You hold the keys to game-changing results.

Choose a best in class solution with world class development & guidance.

GO



10 STEPS - UNLIMITED POTENTIAL

