

NEW! Customer Sales Concentration Report

August 2023

For questions, please contact:

Lori Bauer Senior Vice President, Affiliate Sales and Support Ibauer@ipromoteu.com



NEW! Customer Sales Concentration Report

- ASSESS YOUR RISK PROFILE based on your mix of business. Top 5 Customer Rankings by:
 - ✓ \$'s: non-captive invoiced sales by customer and cumulatively over your top 5 customers
 - ✓ % of total business: by customer and cumulatively over your top 5 customers
 - ✓ Export to PDF or Excel file
- YTD and FULL YEAR data for last 2 years
- Compare your profile to the Elite 100
 Average Concentration

=			🔔 LBM Lori Bauer				
i	AFFILIATE WEBZONE						
r	CUSTOM PRODUCTS	REPORTING					
≡	PRESENTATIONS						
9	JOBS	ORDER JOURNALS	SALES & INCOME JOURNALS				
Ξ	BUNDLED POS	Order Journal	Sales Journal				
:	DISPUTES	Job Summary Order Journal	Job Summary Sales Journal				
E.	ARTWORK	Order Comparison	Income Journal				
- -	CUSTOMERS	Booked/Billed Orders Comparison	Customer Sales				
_		Order Journal Item Detail	Customer Sales Concentration				
π	VENDORS	Performance YTD	Industry Category Sales				
I.	REPORTING	Open Order					
•	MANAGE AFFILIATE ORG.						
	DATABASE ACTIVITY	ACCOUNTS RECEIVABLE & PAYMENTS	OTHER REPORTS				
	ALERT	Payment History	Sales Tax				
		Expected Payment	Vendor Purchase Journal Summary				
		Payment History OCR	Reorder - Remind Your Clients It's Time to Reorder				
4	SUPPORT & FEEDBACK	Open Advances	Order Customer Info				
-		Account Receivable Aging	Reorder Usage				
		Credit Management	Affiliate Performance Ranking				

<≡				🛕 📙 Lori B
		×		
8	AFFILIATE PRE: Select 308:		Run report with one-click, selecting Affiliate Code.	
i ≶≡	BUN			SUBMIT EXPORT -
	DISPUTES	Order Comparison Booked/Billed Orders Comparison	Income Journal Customer Sales	
Ŭ	CUSTOMERS	Order Journal Item Detail	Customer Sales Concentration	
	VENDORS	Performance YTD Open Order	Industry Category Sales	



"Test" Affiliate Example

LOWER RISK PROFILE

- ✓ Top customer represents 4.5% of business mix
- ✓ 19% of mix concentrated within top 5 customers
- ✓ 81% of business spread across all other accounts
- Fairly even mix without too much concentration in top 5
- Opportunity to expand share within top customers as well
- Compare to Elite 100 average concentration as a benchmark

CUSTOMER SALES CONCENTRATION REPORT

2019 YTD **	CODE	CUSTOMER	\$*	%	CUM \$	CUM %
1	OPTIMA_RWJ	Optima Health	\$ 45,454	4.5%	\$ 45,454	4.5%
2	C1003	Midwestern Rail Transport	\$ 44,466	4.4%	\$ 89,920	8.9%
3	C1001	International Health	\$ 35,899	3.6%	\$ 125,818	12.5%
4	C1002	Professional Sports Agents	\$ 35,671	3.5%	\$ 161,489	16.0%
5	C1005	Legal Consultants	\$ 32,961	3.3%	\$ 194,450	19.3%
All Others			\$ 813,941	80.7%	\$ 1,008,391	100.0%
2018 Full Year	CODE	CUSTOMER	\$*	%	CUM \$	CUM %
1	C1006	Universal Software	\$ 165,239	6.7%	\$ 165,239	6.7%
2	C1002	Professional Sports Agents	\$ 137,630	5.6%	\$ 302,868	12.3%
3	C1007	Hi Tech Manufacturing	\$ 99,848	4.0%	\$ 402,716	16.3%
4	C1008	Florida Restaurant Group	\$ 87,966	3.6%	\$ 490,682	19.9%
5	C1009	Southwest Healthcare	\$ 81,287	3.3%	\$ 571,969	23.2%
All Others			\$ 1,895,824	76.8%	\$ 2,467,793	100.0%
2017 Full Year	CODE	CUSTOMER	\$*	%	CUM \$	CUM %
1	C1006	Universal Software	\$ 168,462	7.1%	\$ 168,462	7.1%
2	C1002	Professional Sports Agents	\$ 110,274	4.6%	\$ 278,736	11.7%
3	C1005	Legal Consultants	\$ 61,509	2.6%	\$ 340,245	14.3%
4	C1010	Southern Machinery	\$ 58,391	2.5%	\$ 398,636	16.8%
5	C1011	Valley Broadcasting	\$ 44,258	1.9%	\$ 442,894	18.7%
All Others			\$ 1,938,842	81.5%	\$ 2,381,736	100.0%

2018	ELITE 100 AVERAGE CONCENTRATION	%	CUM %
1		1.6%	1.6%
2		1.2%	2.8%
3		1.1%	3.9%
4		.8%	4.7%
5		.7%	5.4%
All Others		94.6%	100.0%

* Non-Captive Invoiced Sales Only

** YTD to End of Prior Month



"Test" Affiliate Example

HIGHER RISK PROFILE

- ✓ Top customer represents 24% of business mix
- ✓ 71% of mix concentrated within top 5 customers
- ✓ 29% of business spread across all other accounts
- Highly concentrated in top 5 customers with an opportunity to prospect and diversify
- Top 3 customers = 57.5% of mix
- Compare to Elite 100 average concentration as a benchmark

CUSTOMER SALES CONCENTRATION REPORT

2019 YTD **	CODE	CUSTOMER		\$*	%		CUM \$	CUM %	
1	C0002	Suburban Auto	\$	47,035	24.1%	\$	47,035	24.1%	
2	C0001	American Manufacturing	\$	34,013	17.4%	\$	81,048	41.5%	
3	C0003	Central Produce	\$	31,220	16.0%	\$	112,268	57.5%	
4	C0005	Acme Contruction	\$	13,701	7.0%	\$	125,970	64.5%	
5	C0004	Unified Charities	\$	12,850	6.6%	\$	138,820	71.1%	
All Others			\$	56,490	28.9%	\$	195,310	100.0%	
2018 Full Year	CODE	CUSTOMER		\$*	%		CUM \$	CUM %	
1	C0003	Central Produce	\$	217,709	47.1%	\$	217,709	47.1%	
2	C0002	Suburban Auto	\$	37,655	8.1%	\$	255,364	55.2%	
3	C0005	Acme Contruction	\$	34,531	7.5%	\$	289,896	62.7%	
4	C0009	Specialty Foods	\$	20,666	4.5%	\$	310,561	67.2%	
5	C0007	National Association	\$	19,493	4.2%	\$	330,054	71.4%	
All Others			\$	132,045	28.6%	\$	462,099	100.0%	
2017 Full Year	CODE	CUSTOMER		\$*	%		CUM \$	CUM %	
1	C0003	Central Produce	\$	576,535	71.1%	\$	576,535	71.1%	
2	C0002	Suburban Auto	\$	41,899	5.2%	\$	618,434	76.3%	
3	C0005	Acme Contruction	\$	32,133	4.0%	\$	650,568	80.3%	
					/	\$	676,853	83.5%	
4	C0008	Marketing Group	\$	26,286	3.2%	Ŧ	,		
<u>4</u> 5	C0008 C0004	Marketing Group Unified Charities	\$	26,286 18,390	3.2% 2.3%	\$	695,243	85.8%	
				-		-	-	85.8% 100.0%	
5			\$	18,390	2.3%	\$	695,243		
5			\$	18,390	2.3%	\$	695,243		
5 All Others		Unified Charities	\$	18,390	2.3% 14.4%	\$	695,243	100.0%	
5 All Others 2018		Unified Charities	\$	18,390	2.3% 14.4% %	\$	695,243	100.0%	
5 All Others 2018 1		Unified Charities	\$	18,390	2.3% 14.4% % 1.6%	\$	695,243	100.0% CUM % 1.6%	
5 All Others 2018 1 2		Unified Charities	\$	18,390	2.3% 14.4% % 1.6% 1.2%	\$	695,243	100.0% CUM % 1.6% 2.8%	
5 All Others 2018 1 2 3		Unified Charities	\$	18,390	2.3% 14.4% % 1.6% 1.2% 1.1%	\$	695,243	100.0% CUM % 1.6% 2.8% 3.9%	

* Non-Captive Invoiced Sales Only

** YTD to End of Prior Month



THANK YOU!

Your Affiliate Sales Directors are available to assist with report training.

Gary Goodhart: <u>ggoodhart@ipromoteu.com</u> Guy Dupuis: <u>gdupuis@impromoteu.com</u>

