

PROFIT PLAYBOOK

7 PLAYS TO INCREASE REVENUE

Data-Driven Revenue Strategies

That Unlock Growth & Uncover
Opportunities for Distributors

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Winning more deals and increasing revenue are among every distributor's goals, but it comes with an ever-expanding list of challenges. Customer expectations are evolving, buying behavior is shifting, and data-forward sales tools are quickly becoming non-negotiable.

Organizations almost always have room for improvement, from sales process inefficiencies to customer churn. Tactical challenges like ineffective lead flows, a lack of account history, or slow response times immediately affect businesses' bottom lines: lower revenue, higher costs, fewer sales.

Emerging from these organizational challenges and evolving market conditions are new and untapped opportunities for growth in the distribution space. Real-time customer insights and optimized sales processes ensure timely follow-up with the right customer at the right time, allowing sales teams to forecast with greater accuracy and close deals faster.

“The future of distribution is a digital-first, data-driven sales model.”



– **Tom Gale**, CEO, Modern Distribution Management



Tech-Forward, Data-Driven Strategies for Measurable Impact

The right strategies combined with the right tools are game-changers for any business, distributors included. Data, analytics, and business intelligence drive how sales resources are allocated and guided. When housed within a comprehensive CRM designed specifically with distributors in mind, new areas for growth are unlocked and no opportunities to maximize revenue are left on the table.

Businesses that leverage a CRM see:

29%

increase in sales

34%

increase in
productivity

42%

increase in
forecast accuracy

Whether you're looking to gain new customers or unlock opportunities with existing customers, it takes a data-driven strategy to move the needle.

Read on for seven winning strategies to add to your playbook to increase revenue, crush the competition, improve profitability, and set your sales team up for attainable, long-term success.

"The companies we've seen move up or maintain high spots on our Top Distributors Lists tend to have one key thing in common: **Reinvestment.**"

These companies have identified what they do better than their competitors, and then double down on it to ensure that it is a differentiator. This often involves investing in technology to take that differentiator to the next level."



– **Mike Hockett**, Executive Editor,
Modern Distribution Management

PLAY 1

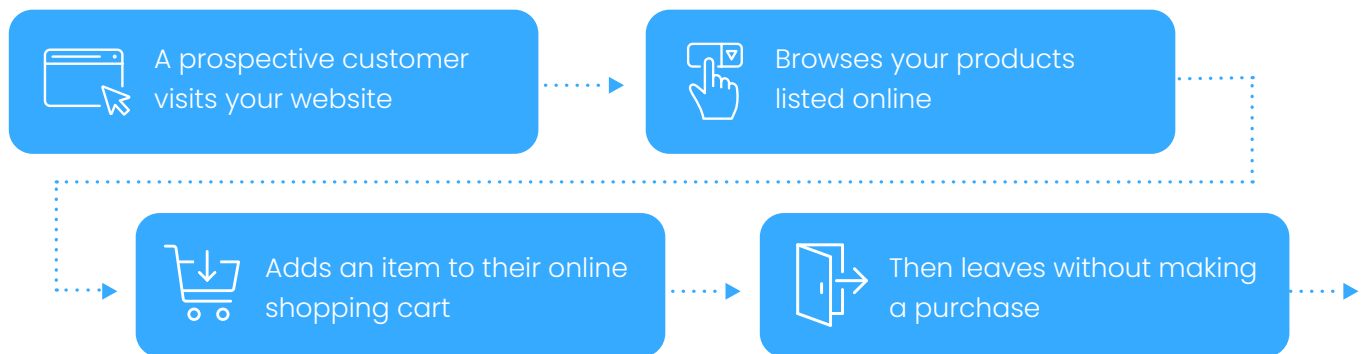
Unify Online and Offline Buying Channels

The digital transformation in distribution in recent years has made the need to bridge the gap between online and offline sales more critical than ever. Customer buying behavior continues the trend toward digital channels. Distributors can miss valuable opportunities by failing to innovate in this emerging era of selling.

Nearly two-thirds (65 percent) of B2B companies across industries allow customers to fully perform a sales transaction through eCommerce, up from 53 percent in 2021. B2B sellers are now more likely to offer eCommerce channels than in-person selling as a direct response to consumer demand.

That's not to say that traditional, in-person or catalog-based selling is out. Distributors can and should use eCommerce as a vehicle for boosting offline sales by analyzing online customer behavior. Integrating eCommerce with your CRM lets you see customers' activity and take action in real-time, capturing otherwise lost opportunities.

For example:



Armed with this information about the prospect's online activity, a sales rep can have a more meaningful conversation with the person – personalizing the outreach, for instance, or answering questions they may have about the products or the eCommerce experience.

Strategic, data-driven eCommerce is so much more than just a digital catalog for distributors. Seamless online transactions enhance the customer experience, and when paired with business intelligence from your ERP and CRM, they become powerful tools to increase sales with current customers.

PLAY 2

Develop Marketing Campaigns for Behavioral Customer Segments

If you sell, you need to market. While the primary marketing goals of increasing awareness and generating qualified leads remain consistent, distributor marketing differs from other industries in some important ways. As the middleman between manufacturers and customers, it's all about balancing relationships.

Targeted marketing strategies anchored in customer behavior and interactions are key to success, helping you bring value to relationships on either side of the equation. A CRM with BI enables you to successfully target specific audiences by turning raw data into actionable insights.

Leverage those insights to establish a solid online presence with compelling messaging that truly resonates with your intended audience. With CRM and BI, your marketing efforts can seamlessly target the same accounts and contacts that sales reps are pursuing.



Here are a few examples of features distributors can utilize to elevate and personalize their marketing efforts.



Targeted Email Campaigns for Dying Stock Use

BI reports identify dying stock and leverage email marketing to promote overstocked items to customers who have shown past interest in these products.



Bundle Offers for Related Products

Package slow-moving items with best-sellers or complementary products at a discounted rate, encouraging customers to see value in bundle purchasing.



Exclusive Deals for Loyal Customers

Target your loyal customer base with exclusive offers, making them feel valued.



Industry-Specific Email Campaigns

Create tailored email marketing campaigns focusing on specific industries you serve, like construction or healthcare, highlighting products and solutions that cater to their unique needs.



Regional Promotions

Launch marketing campaigns targeting customers in specific geographic regions, accounting for local trends, regulations, and preferences.

“Start with a specific, targeted end in mind. What does that mean? It means modeling your online presence to be similar to how an outside salesperson would think. Salespeople know the difference between audience segments – they know that different audience segments may buy the same products but for different reasons ... **They’re not going to have the same conversations with each segment, and neither should your digital collateral.**”



– **Susan Merlo**, Founder of The Digital Distributor Program and Author of *The Digital Distributor: 6 Steps to Accelerate Sales*

PLAY 3

Streamline Workflows for Efficiency

Time is of the essence when it comes to distribution sales, and streamlining workflows allows you to exponentially boost sales without needing to expand your team. It's all about how well your sales reps can guide prospects through their journey and convert them into customers.

Imagine a scenario where customer insights trigger a cascade of automated actions, from assigning new leads to specific reps to initiating targeted email campaigns. With this automated agility, sales reps can respond faster and ensure no opportunities are left unexplored.

Some workflows to focus on that maximize efficiency include:

Open Deal Workflows

Create automated reminders and task assignments in the CRM for each stage of the sales process, triggered whenever a new opportunity is opened.

Customers With Declining Sales or Engagement Workflows

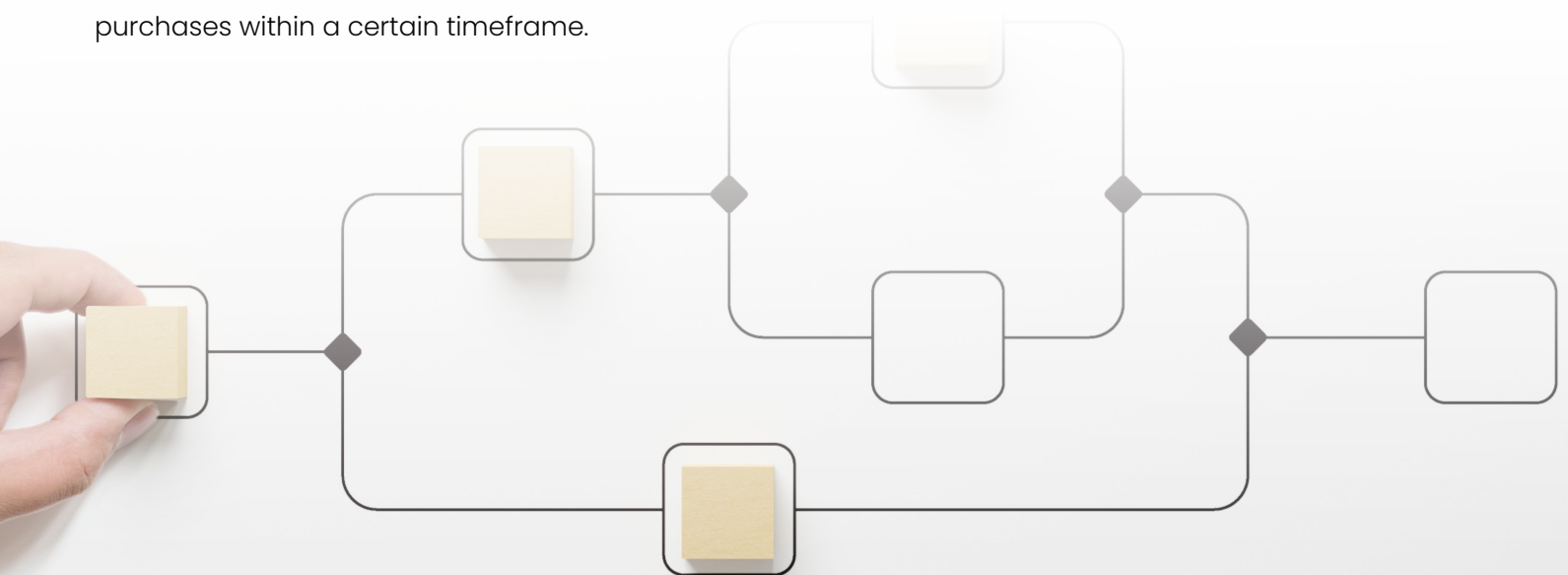
Set alerts in your CRM for drops in customer activity, triggering outreach steps like personalized messages or special offers.

Cart Abandonment Workflows

Integrate the CRM with your eCommerce platform to instantly notify the assigned sales rep to follow up with customers who haven't completed their purchases within a certain timeframe.

Customer Review Workflows

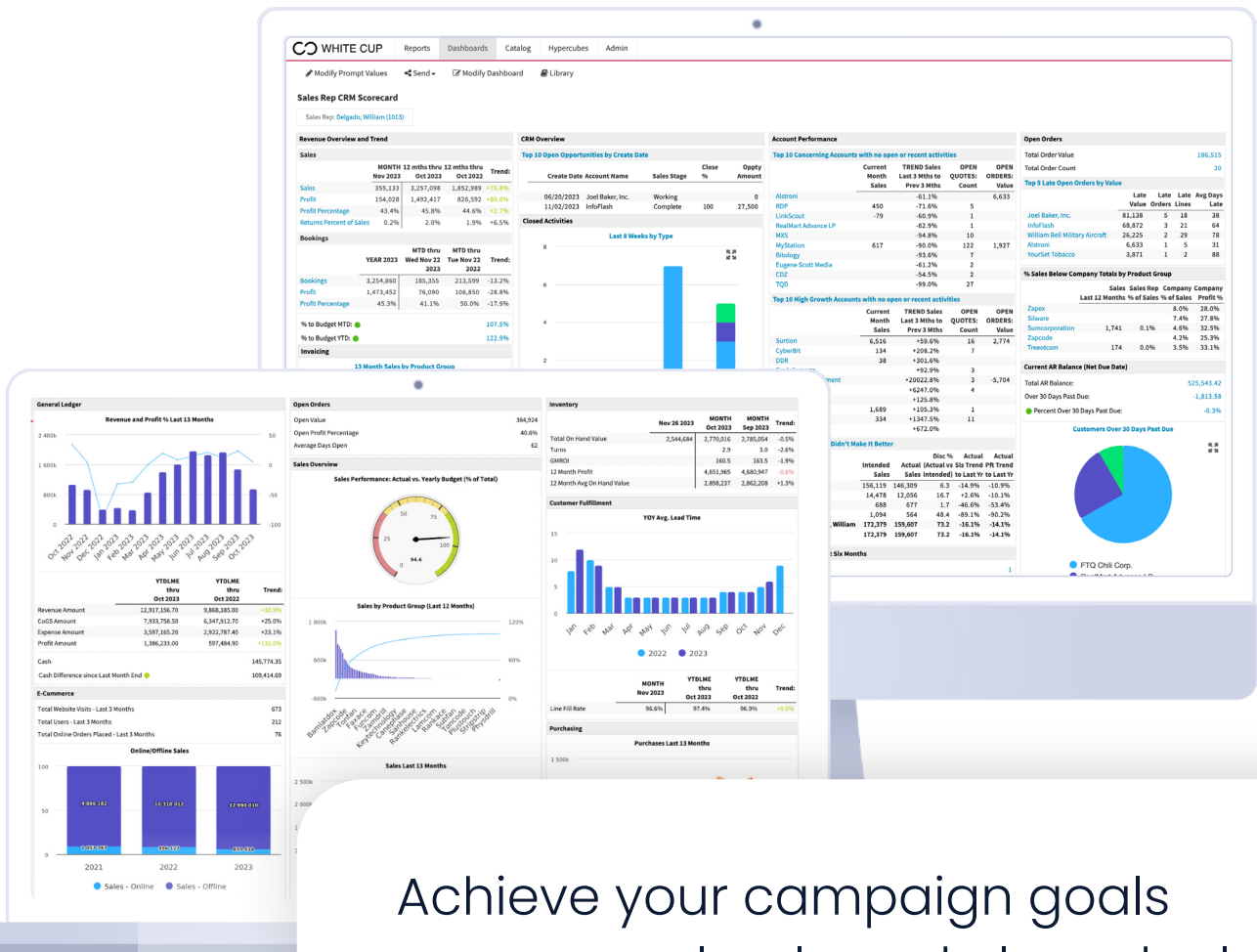
Trigger automated, personalized post-purchase emails through your CRM, soliciting customer feedback and reviews.



To best maximize this strategy in your playbook, tap into the power of a CRM to act on insights faster with built-in, automated workflows that send automated lead notifications to the right reps at the right time and send communications to customers at the opportune moment. CRM software is so much more than just a tool to log activity and track sales performance. It empowers sales reps to be more productive, responsive, and effective with insights that prompt better conversations and streamlines processes that improve efficiency.

Having one central source of truth for all customer data across departments also helps break down silos and fosters a culture of collaboration, enabling more effective marketing and selling.

Eliminate the need to click between multiple dashboards and access a complete picture of the customer insights from a centralized location. Integrations between your CRM and your existing ERP allow the entire team to view the same information from the same location. At the same time, built-in automation features remove friction points from manual tasks.



Achieve your campaign goals more seamlessly and close deals **75 percent faster.**

PLAY 4

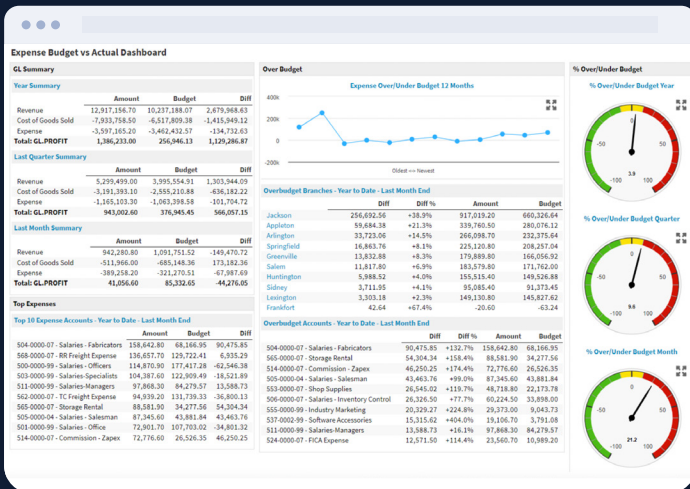
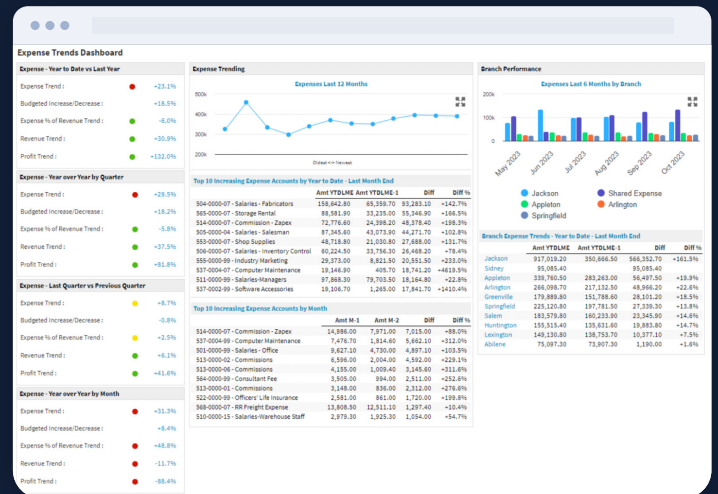
Automate Tracking and Analyze Meaningful Metrics That Drive Improvements

Data empowers better decision-making, providing a comprehensive 360-degree view of your business and customers. Simply collecting data isn't enough: the key is to unravel the web of information, revealing actionable analytics and insights.

That's where a business intelligence tool like White Cup BI, designed for distribution-specific reporting and data visualizations, comes in. Forecast more accurately, identify your most profitable customers, and inspire action from your CRM and ERP databases.

What does this look like in practice?

Automate tracking the [KPIs and metrics that matter most](#) to your organization's health, from revenue and sales performance to customer retention and inventory management. See where your biggest growth opportunities are at a glance with executive dashboards and sales rep scorecards that reflect the most up-to-date numbers.



Set realistic targets and accurate sales forecasts with predictive analytics that keep your team on the same page, while easily comparing actual performance and trends to those goals.

Gain a clear picture of when adjustments are needed and the next best actions to stay on track.

Implementing BI tools for data-driven decisions benefits your entire company, giving every team member access to the insights they need from one location and inspiring organizational collaboration.

SALES> **Monitor sales trends and evaluate performance**, guaranteeing the right supports are in place for consistent target achievement.

EXECUTIVE LEADERSHIP> **Build efficiency at every level of operations** and keep a finger on the pulse with a single source of truth.

ACCOUNTING & OPERATIONS> **Plan for budgeting, capital allocation, profitability, and shareholder value** with greater visibility into revenue, forecasting, orders, and purchasing data.

MARKETING> **Better engage with prospects and customers** by aligning campaigns and messaging with sales goals, available inventory, pricing, and promotions.

IT> **Reduce the burden on the IT team** by having actionable insights and reports available in an easily accessible location that everyone at the company can use.

Distributors that embrace data analytics gain immediate and long-term competitive edges by deciphering market trends, understanding customer behaviors, and optimizing operations. **Empower your team to focus on the right opportunities with comprehensive visibility into all areas that matter.**



PLAY 5

Modernize Human-Led Selling and Customer Relationships

Move your business up a level by embracing a CRM for distributors that integrates data from customer interactions with automation, empowering your sales reps to do their best work.

The rep's role is shifting in the face of modern selling and buying. Now, buyers often engage in extensive research, scrutinizing product details, reviews, and competitive alternatives well before engaging with a sales professional – if they choose to do so at all.

There are many ways to leverage a CRM to enhance customer interactions, including:

- Generating customer scorecards
- Identifying the most profitable accounts and contacts
- Seeing purchasing trends
- Staying on top of open or late orders
- Viewing customers' online activity

Sales technology empowers more strategic consultative selling by centralizing customer, product, and sales insights so reps can more effectively and efficiently close deals.

75%

of B2B buyers say they do not want to talk to a salesperson to order a product. ([Gartner](#))

“Customers often build long-term relationships with distributors because **they learn to trust the people**. It's essential that they develop the same level of trust with your digital tools.”



– **Ian Heller**, Founder and Chief Strategist at Distribution Strategy Group ([Source](#))

PLAY 6

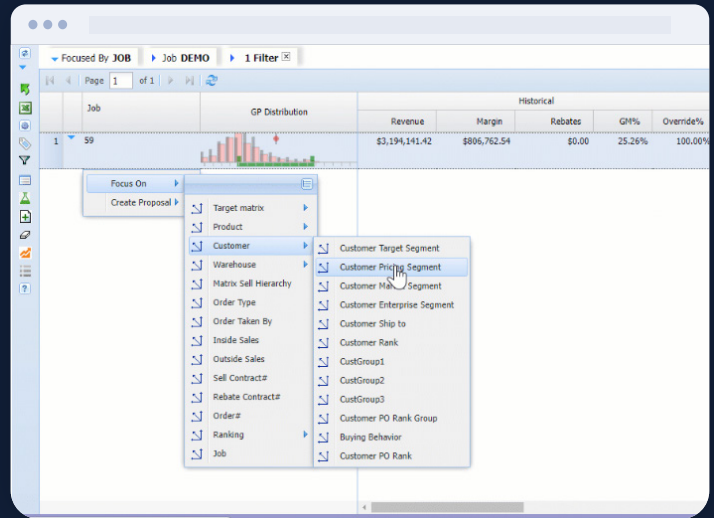
Use Pricing Strategies that Maximize Profits

Pricing is one of the most significant areas for increasing profitability, but it can also be one of the most challenging to navigate. Your pricing strategy should not be a one-size-fits-all solution, but a dynamic, responsive model that fits your specific customer segments.

Inconsistencies can be destructive. Even a one percent price discount can lower profit so much that sales must increase in kind by 20 percent just to break even.

Price drives up to four times more profit than sales volume, but how do you set pricing strategies for maximum profit?

1. Set pricing based on real data — there are [tools available](#) to help you make more informed decisions.
2. Use customer segmentation to group audiences together by buying habits, profitability, and cost to serve to uncover opportunities for price adjustments.
3. Ensure consistency in how pricing decisions are made across the team with a systematic, data-driven approach to pricing to minimize overrides.



4. Conduct buying and product data analysis to discover cross-selling opportunities.

When you base your pricing decisions on accurate, real-time insights, you stay competitive and ensure that your pricing remains in harmony with market dynamics.

PLAY 7

Integrate Growth Opportunities and Expansion Strategies

Sustainable growth requires more strategy and cross-functional collaboration than ever before.

Not only is the role of the sales rep shifting to take on more of a consultative approach when engaging with customers, but the very way those prospects are shopping and buying is evolving.

Disconnected data, particularly between online and offline sales, is a significant but surmountable challenge many distributors face right now. It's also one of the largest areas of opportunity.

When it comes to eCommerce, a primary focus is ensuring seamless integration between your Product Information Management (PIM) system and the eCommerce platform. This integration is crucial for showcasing the most compelling and accurate product descriptions and photos. Updating and enriching your catalog within the PIM not only enhances the quality of your online presence but also ensures that your eCommerce storefront effectively reflects these improvements.

That's important, but it's only one part of the picture. eCommerce is so much more than just a revenue generator; it's a tool to better understand how your customers act and what they need. Extract valuable insights from customer behavior data – like their online shopping activity – to enable smarter decision-making, improve the customer experience, and nurture data-driven growth.



As buying behaviors evolve, eCommerce can't be just an add-on, it should be incorporated into the overall sales process and strategy with behavior data that can be shared between teams.

Top distributors are investing in business intelligence and embracing a collaborative approach to leveraging the data available from online buying platforms. Lost or unmanageable data translates directly to missed opportunities, while having a clear picture of your business and all areas of growth ensures no opportunities are left on the table.

“Behavior data really does act as sales leads in one way or another. Even if they didn't follow through on a purchase, it shows interest in a particular product or service which you can then leverage with your sales team to follow-up on.

I see it as such a collaborative tool for sales staff as long as you can get over that hump of any potential animosity ... there's an interesting dynamic of getting your sales staff and, really, the whole organization to **embrace eCommerce rather than having it exist in a silo.**”



– **Mike Hockett**, Executive Editor,
Modern Distribution Management



BONUS PLAY

Leverage Artificial Intelligence To Take Your Next Best Action

All industries have been buzzing about AI over the past few years, particularly with advancements in this technology moving along and improving at a rapid pace. This hype has inevitably brought along with it some pushback, concern, or misconceptions around AI's implications.

Distributors who can cut through the noise and identify practical use cases for AI will be at an advantage, leveraging its capabilities to gain a competitive edge and, ultimately, bolster profits and productivity. AI-powered features in your CRM and BI will turn data into decisive action with clear direction on which tasks to tackle next.

While some CRM systems require users to prompt AI by knowing and asking the right questions, White Cup's AI solutions remove that step and jump straight to prescriptive actions by already having a deep understanding of distributors' specific needs.

The essence of practical AI adoption in distribution can be used to unearth your next best actions in the following ways:

Enhancing Demand Forecasting

- AI can be used to turn complex sets of historical sales data into accurate, actionable forecasts and trend projections, saving your sales team hours of manual forecasting work every month and quarter.
- Better demand forecasting helps in maintaining optimal inventory levels, reducing waste, and improving customer satisfaction by ensuring product availability.



Personalizing Customer Experiences

- AI-driven automation can be employed to create personalized shopping experiences, from recommending products popular among similar customers, to proactively prompting sales reps to reach out if a customer deviates from their typical purchasing patterns.
- This personalization leads to increased customer engagement, higher sales, and improved customer loyalty.



Making Strategic Moves

- Actionable insights offered by AI ensure that your next move isn't just data-driven, but also strategically sound to turn untapped potential into real revenue.
- AI supports business growth by equipping distributors with straightforward tools for growth, suggesting and directing your next actions.

Putting These Plays Together With White Cup

Individually, each of these plays will make a difference to your bottom line. Together, they are incredibly powerful, with transformative potential for your business. White Cup gives distributors the tools needed to put all seven plays into action in ways that will increase revenue in the coming year and beyond.

Our distribution-specific CRM, Business Intelligence (BI), and Pricing software can help you turn your biggest sales challenges into opportunities for growth immediately by providing clear, data-backed insight into your performance and priorities. Being armed with the right information at the right time means you can sell smarter, faster, and easier.

For instance, with White Cup, you can:

- Determine your next best actions based on business intelligence data around sales forecasts, customer buying behavior, inventory, and other trends for targeted marketing campaigns.
- Leverage pre-built dashboards, scorecards, sales forecasts, and other accessible data visualizations for more confident decision-making backed by a 360-degree view of your business.
- Improve the customer experience with personalized engagement, value-added services, and seamless online buying channels to meet the challenges of today's sales expectations.



With a CRM and BI built specifically for distributors, driving revenue with data and analytics has never been more straightforward.

Schedule a Free Consultation To Unlock Growth and Leverage New Opportunities

What could a distributor-tailored CRM, comprehensive business analytics, and data-backed pricing optimization do for your business? Connect with our team to learn more about how White Cup can empower each member of your team, unlocking growth opportunities and addressing your most pressing sales challenges.

[Schedule a complimentary one-hour consultation today](#) to learn how we can support your growth.

[Get Started Today](#)



"I can confidently say that White Cup is a game changer for any business looking to make data-driven decisions. We use insights that we get from White Cup BI to create opportunities or leads within the CRM, launch marketing campaigns, and feed the data directly to sales."



– **Cole Callahan**, Director of Strategic Initiatives, Callico Distributors, Inc.

About White Cup

White Cup provides a suite of powerful tools and integrated solutions designed specifically for the wholesale distribution industry. White Cup CRM, White Cup BI, and White Cup Pricing combine business intelligence with actionable insights to empower each team member to make proactive, data-driven decisions that unlock growth and leverage opportunities.

**With decades of industry experience,
White Cup is trusted globally by
more than 850 customers.**



WHITE CUP

Learn more at whitecupsolutions.com