

Selling made smarter, faster, and easier

The power of unified White Cup CRM+BI

The next generation of CRM now includes industry-leading business intelligence that helps close deals 75% faster.



Eliminate the frustration and complexity of general purpose CRMs.

- » Sell at scale with distribution-specific functionality like bill-to and ship-to, sophisticated quoting, ability to project and prorate budget and sales, and more.
- » Enjoy a faster time to value with a library of pre-built reports and dashboards that help you manage bookings, inventory, and sales.
- » Integrate with your preferred ERP to ensure the right people have access to the right information at the right time, so your teams can focus on high-impact actions that help win more business.

Drive growth with every action.

Make smarter decisions with easy access to your data and the ability to quickly drill down to validate as needed within White Cup CRM + BI.

The BI-powered sales and ordering data accessible on the White Cup CRM dashboard.

a. SMARTER

Current accounts receivable balance:

Stay on top of customer payment activity that may influence pricing and discounting conversations with current AR Balance data on your CRM dashboard

b. FASTER

Open/late orders: Take quick action to understand and resolve late orders and proactively communicate with customers

c. EASIER

Invoice report: Easy access to up-to date sales, profit and returns data to track monthly goals

The dashboard screenshot includes the following sections:

- Invoicing Report (c):** A table with columns for Sales, Profit, Profit Percentage, and Returns Percent of Sales. It shows data for the current month and previous months.
- Tasks Summary:** A list of tasks with columns for Task Description, Assignee Name, Assigned To, Due Date, Completed By, and Create Date/Last Update.
- Open Orders (b):** A summary showing an Open Value of \$186,515.48 and Open Orders: 0. Below this is a table of late orders with columns for Account, Late Value, Late Orders, Late Items, and Avg Days Late.
- Opportunities Summary:** A table with columns for Name, Quote Amount, Probability, Expected Close Date, Create Date, Last Activity, and Assigned To.
- Current AR Balance (Total Due Date) (a):** A summary showing a Total AR Balance of \$525,543.42, Open Orders of -1813.58, and a Percentage Over 30 Days Past Due of -0.3%.
- Calendar:** A calendar for July 2022 on the right side of the dashboard.

360-degree view of customer accounts including sales, CRM activities and opportunities available within your BI dashboard.

a. SMARTER

Sales and profit trends:

Capitalize on open opportunities and compare sales trends

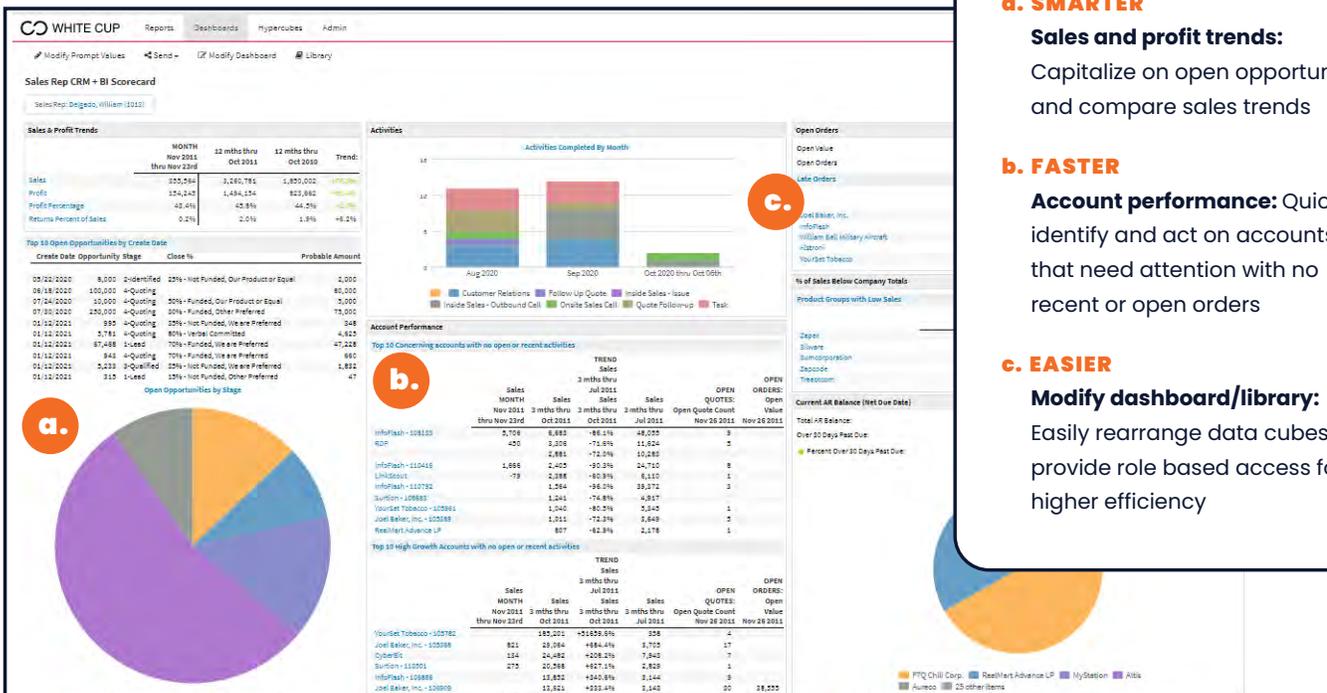
b. FASTER

Account performance: Quickly identify and act on accounts that need attention with no recent or open orders

c. EASIER

Modify dashboard/library:

Easily rearrange data cubes to provide role based access for higher efficiency



The revenue engine focused on driving success.

DRIVE REVENUE

Business intelligence insights on the home dashboard allow you to sell proactively while tracking critical data, like open and late orders.

Year-to-date sales and profit on your CRM dashboard make it simple to spot trends and act on them quickly.

Sales workflows are built-in based on your sales processes that eliminate busywork, so you can focus on selling.

Pipeline management for quick visibility to your pipeline, whether you're leading the team or managing your own deals, making it easy to prioritize prospecting.

Lead notifications are automated, so you know exactly when a prospect becomes a viable opportunity, eliminating leads going cold or falling through the cracks.

Quoting is built-in to push quotes to and from CRM and ERP, provide relevant pricing suggestions, allow use of subtotaling for kitting and packaging, quote and sell serve in addition to hard good, and more

Electronic signature functionality makes it easy for customers to finalize deals without a third-party plugin.

Comprehensive search function shows the relationship between accounts, contacts, opportunities, events and quotes, providing a comprehensive customer snapshot.



BUILD PIPELINE

Marketing automation capabilities empower sales reps, managers, sales ops, and marketing teams to create effective outreach campaigns with seamless drag and drop experience.

Built-in marketing templates make it easy to share your company's value with prospects and customers in a way that's personalized and consistent.

Forecasting tools that help project against your KPIs and prorate your goals so you are armed and confident in achieving your goals.

Dynamic lists are a snap to create based on specific criteria you set. Get started with built-in email marketing templates to engage with dormant contacts. Leverage the dynamic list and finish in just a few clicks.

Email campaign tracking allows you to see who has opened and clicked on your email marketing campaigns, helping to set priorities for follow up.



Improve sales effectiveness and increase conversion by 2X

Protective Industrial Products improved sales effectiveness by 2X, converting more meetings into opportunities, and closing deals 75% faster with White Cup's CRM+BI.

To learn more, visit whitecupolutions.com

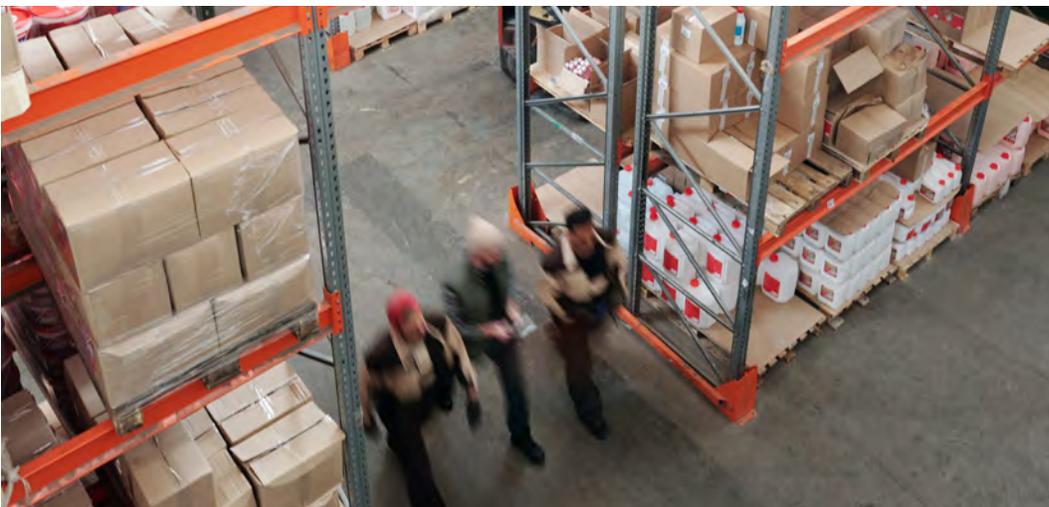
COMPETE WITH CONFIDENCE

Access data anywhere, anytime on any device so you're prepared for prospect and customer conversations that are valuable and drive toward closing deals.

Built-in reports and role-based dashboards help the team stay focused and on track toward the company's sales goals.

Document management makes it possible to attach additional documentation to opportunities, quotes and account records, streamlining communications, customer service, and sales.

Bill to/Ship to functionality ensures your invoice and products are delivered to the right place, even when they go to multiple places.



Our Differentiated Product Offering

| | Solutions | | | | | | | |
|------------------------|-----------|--------|---------------|-------------|--------|-------|---------|------|
| | White Cup | Phocas | Web-Presented | Rubber Tree | Epicor | Infor | HubSpot | SFDC |
| Built for distributors | ● | ● | ● | ● | ● | ● | ○ | ○ |
| Business Intelligence | ● | ● | ◐ | ◑ | ◐ | ◐ | ◐ | ◐ |
| CRM | ● | ◐ | ● | ◑ | ◐ | ◐ | ● | ● |
| Pricing Optimization | ● | | | | ◐ | ◐ | | |
| Marketing Automation | ◑ | | ◐ | | | | ● | ● |
| Service & Support | ◑ | | ◑ | | ◑ | ◑ | ◑ | ◑ |
| Quoting | ● | | ● | | ● | ● | ◐ | ● |

“Vendors in the Revenue Intelligence market differentiate themselves by delivering unique feature combinations to B2B sales organizations.”

– **Gartner Market Guide for Revenue Intelligence Platforms**



WHITE CUP

White Cup offers data-driven selling technology that makes selling smarter, faster, and easier for distributors. White Cup’s industry-specific CRM, Business Intelligence (BI), and Pricing products drive revenue, improve profits, and reduce overall costs. With decades of industry experience, White Cup is trusted by more than 1,000 customers globally.

WhiteCupSolutions.com →