

Case Study

Heitek Automation

Overview of Key BYOR Reports

• Customer Since 2003

• 25 Users

• Epicor Prophet 21 ERP



■ **Location**
Phoenix, AZ

■ **Industry**
Industrial Automation Distributor

■ **Website**
www.heitek.com

Cory Comer - Marketing Manager, on the Executive Sales Summary Report:

"Prior to BYOR, our sales metrics came from multiple different locations, making it difficult to see exactly what was going on not only from a corporate level, but from a territory level as well. With the addition of BYOR, not only were we able to create a "dashboard" with all of our relevant metrics, we created the same report for our sales guys so they can track their goals. At a glance, we now are able to view our corporate metrics across three sales categories: bookings, sales, and profits, quickly extract our run-rates and % of our sales goals, our growth rates, and most importantly our gross-margin as a % of our sales (our goal is 30%). In addition, we can quickly see how each territory is performing against its goals, who is leading the pack, compare it to last year and the overall impact on our company's bottom line. It's fantastic!"

Cory Comer - Marketing Manager, on the Industry Sales Report:

"This report is especially dear to my heart as the Marketing executive for Heitek. Before BYOR, we were not able to determine our sales as they were distributed amongst industry segments. Early on, I implemented NAICS codes into our TDF Account data, but still couldn't readily sum the totals in different segments. Now with BYOR, we are able to see our segments, broken out into 2, 3, 4, or 6 digit NAICS codes, compare growth rates in different sectors and validate our target industries against government industry data. This will make target marketing activities much easier, including prospecting, mailing and other activities. I love it!"



EXECUTIVE DASHBOARD

WEDNESDAY, APRIL 23, 2014



BOOKING YTD	\$ CHANGE	SALES YTD	% CHANGE	PROFIT YTD	% CHANGE
\$1,000,000	\$100,000	\$1,000,000	10%	\$100,000	10%
BOOKING MTD	\$ CHANGE	SALES MTD	% CHANGE	PROFIT MTD	% CHANGE
\$100,000	\$10,000	\$100,000	10%	\$10,000	10%
YESTERDAY	LYMTD	YESTERDAY	% OF GOAL	YESTERDAY	GM %
\$100,000	\$100,000	\$100,000	10%	\$10,000	10%

TERRITORY REPORT

SALES	% Goal	Goal	Growth	YTD	LTD	YTD	Budget	L1	ZF
Don McInnis	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Shawn Hendler	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Wayne Roberts	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Don Lovell Jr	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Randy Brown	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Tim Alinger	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Mark Hayslip - El Paso	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Mississippi	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Heitek Automation	100%	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000
PROFITS	% Goal	Goal	Growth	YTD	LTD	YTD	Budget	L1	ZF
Don McInnis	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Shawn Hendler	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Wayne Roberts	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
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Tim Alinger	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
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Mississippi	100%	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000	\$100,000
Heitek Automation	100%	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000	\$1,000,000

Heitek Executive Dashboard Report

