



LEARNING
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Enhancing Profitability For Healthcare Distributors Series

Leveraging Industry Data



Nick Pericle
Managing Director, Distribution



ProfitOptics



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Enhancing Profitability for Healthcare Distributors (Pt 4 of 4)

Leveraging Industry Data

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**How well do you know
your customer?**

**How do you get to know
your customers better?**

How do you get to know your customers better?

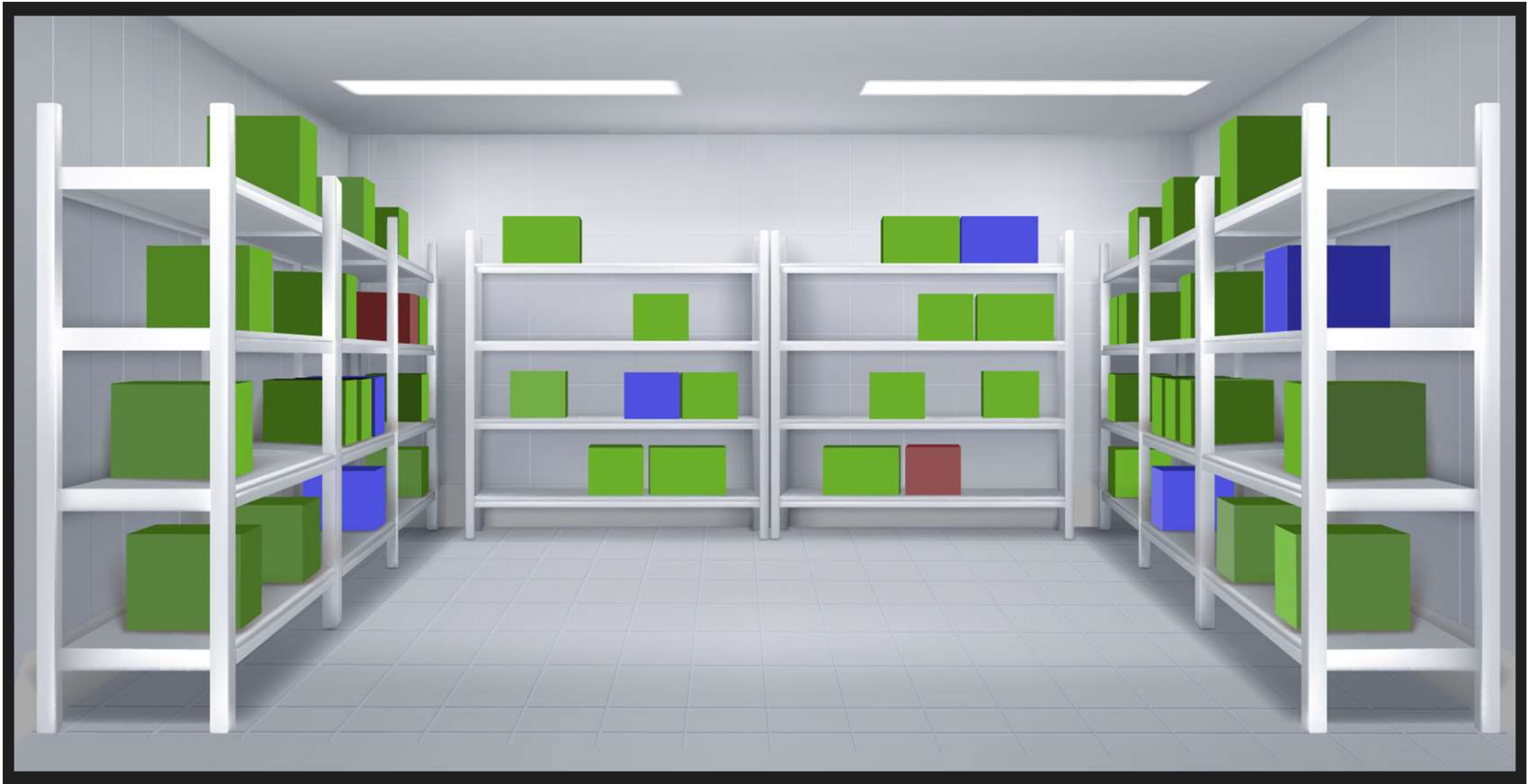
- **Historical Interactions**
- **Virtual Check-Ins**
- **Sales Rep On-Site**

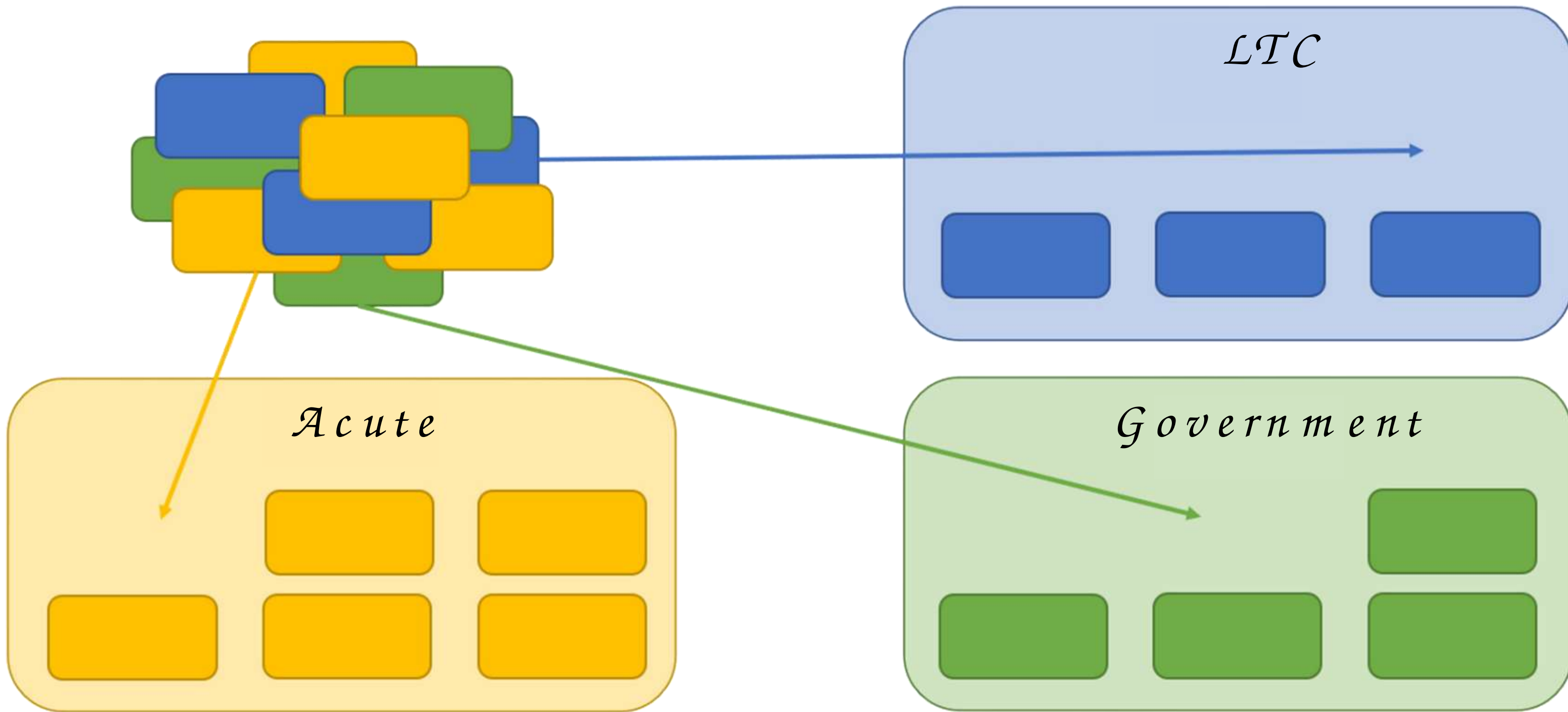
What % of your customers do you visit on-site 1x/quarter?

Wallet Share

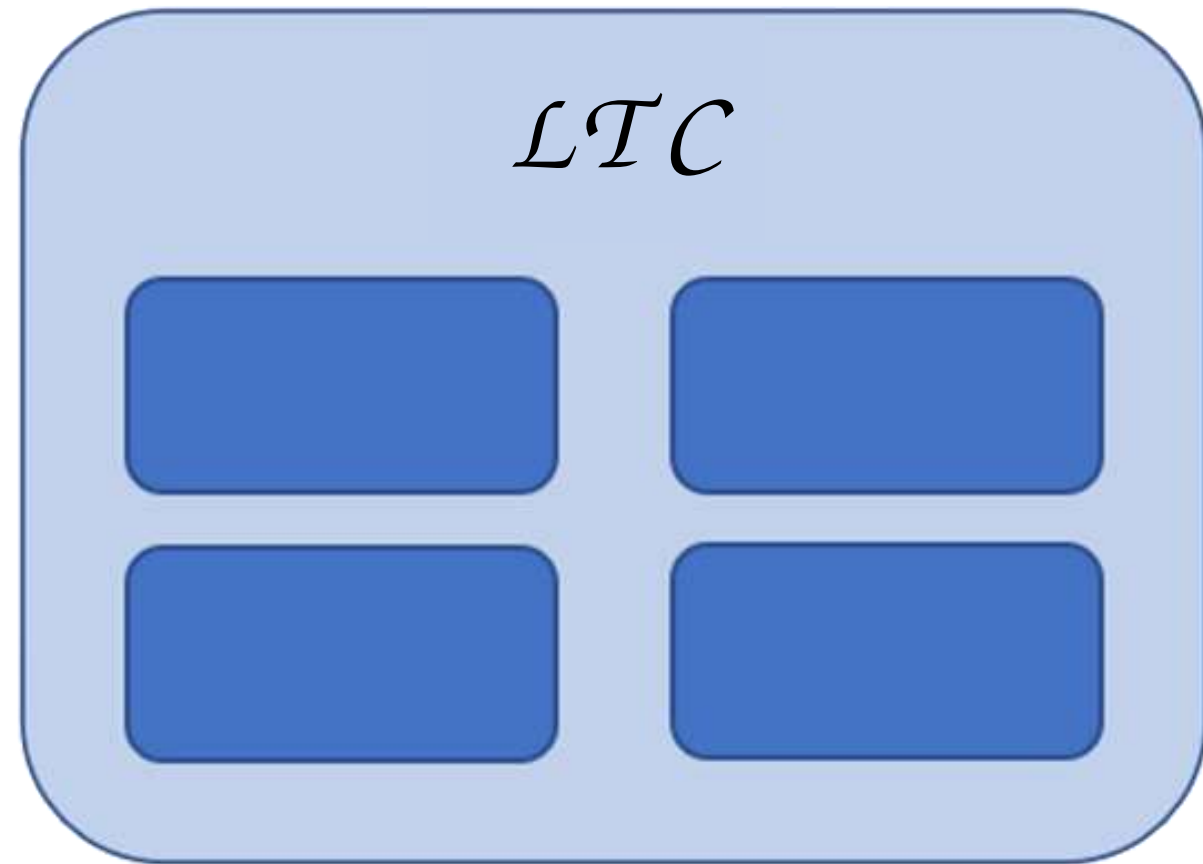
Wallet Share

The percentage of a customer's total spending within a category that goes to your business

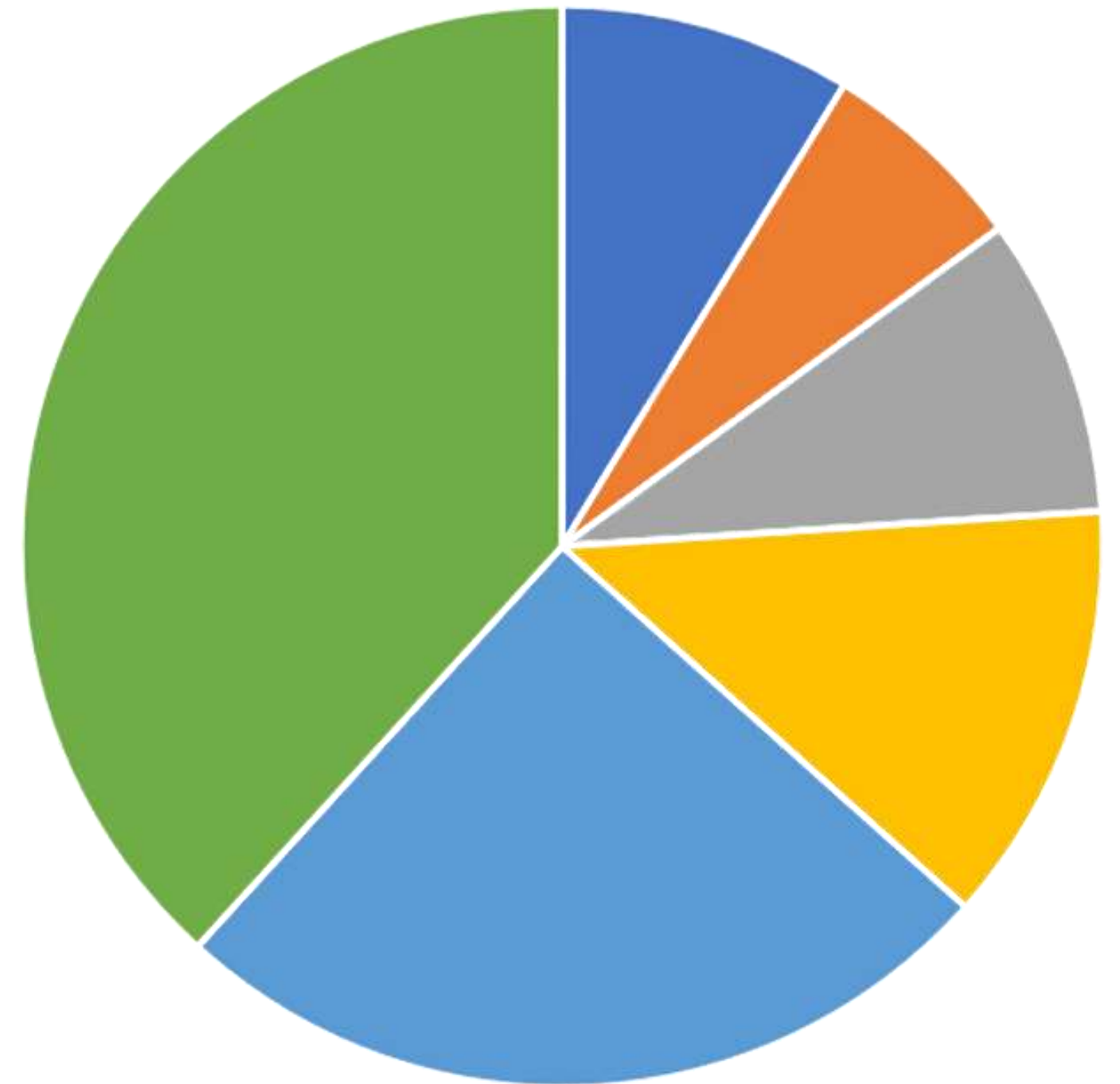




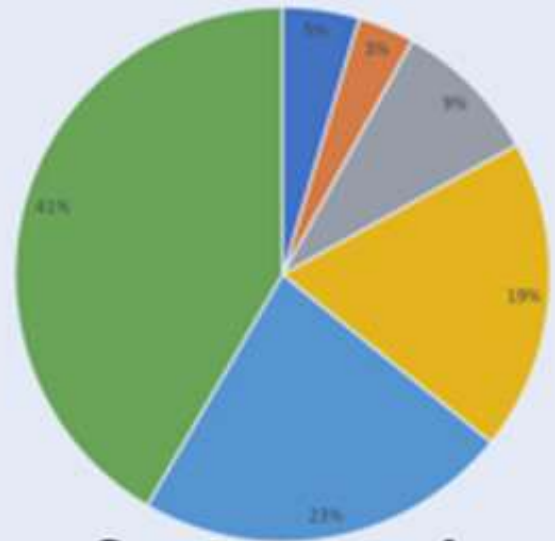
Customer Segment



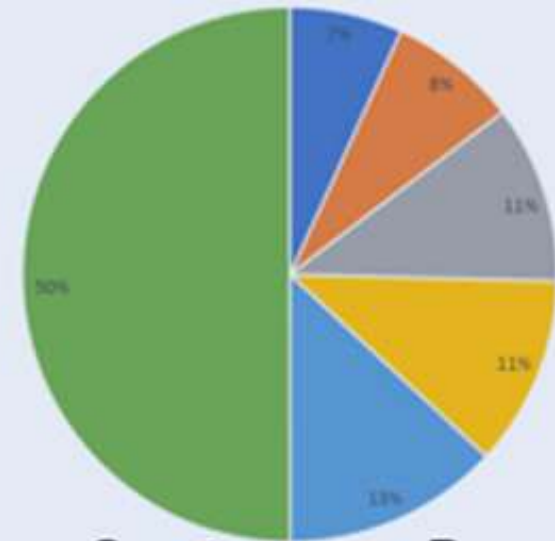
Product Category Profile



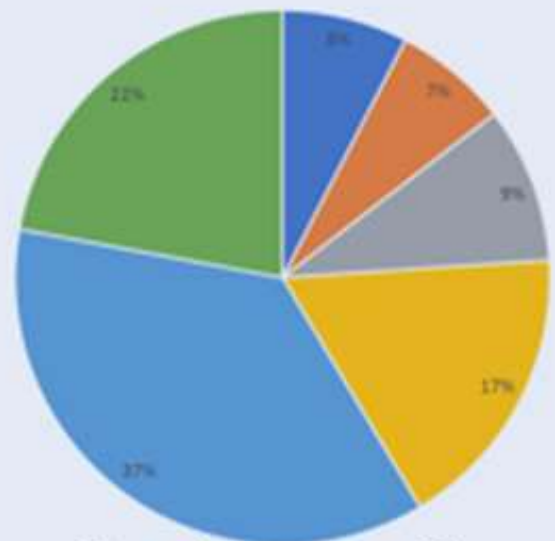
Customer Segment: Services



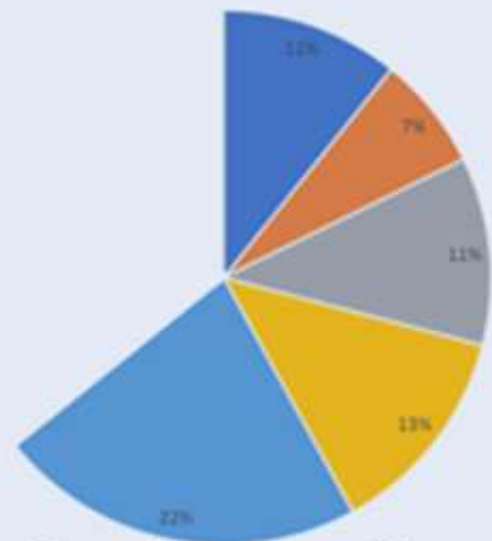
Customer A



Customer B

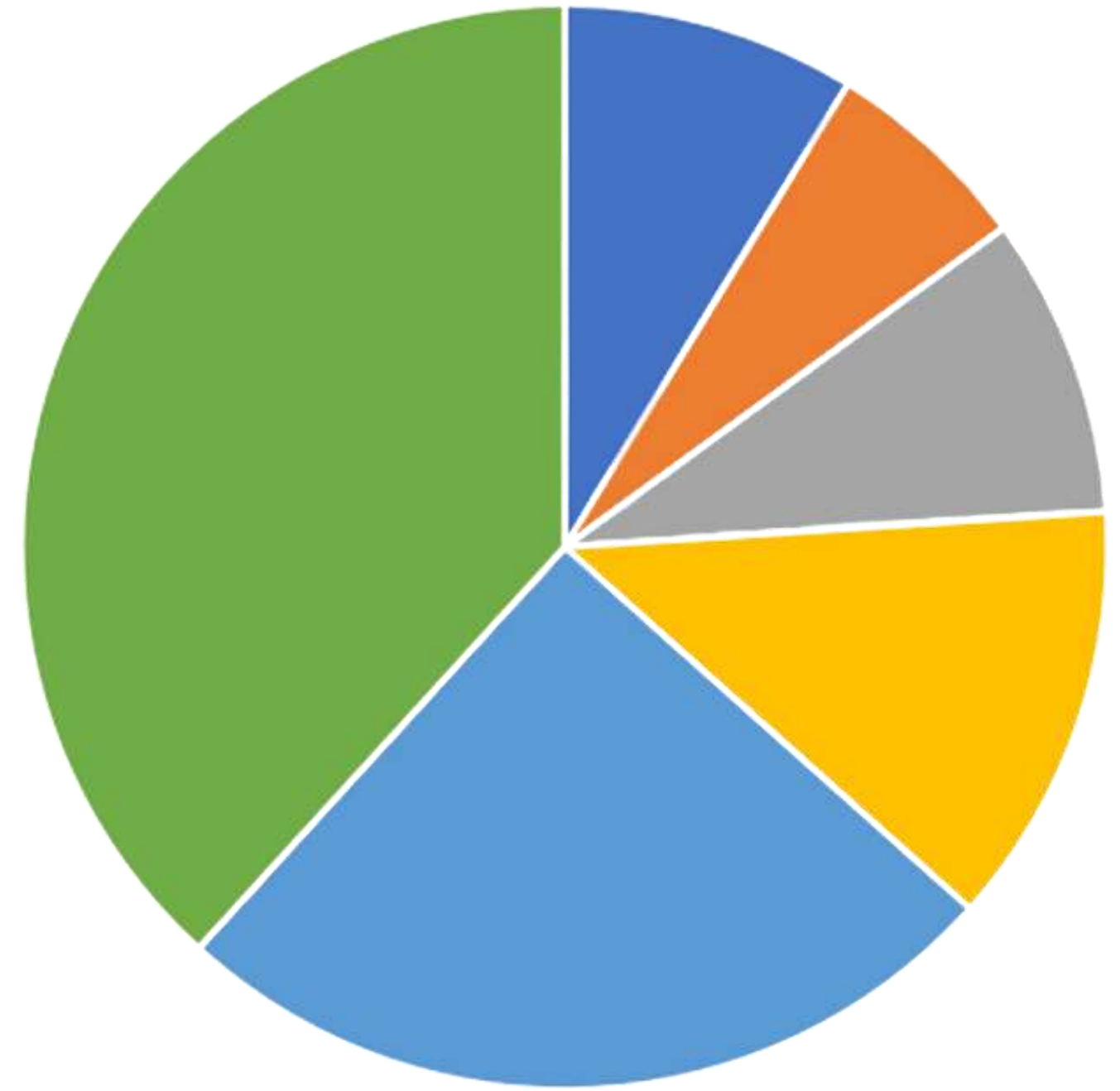


Customer C






Customer D

Product Category Profile



Wallet Share: Customer Summary

Show Customer/Category Opportunities > \$

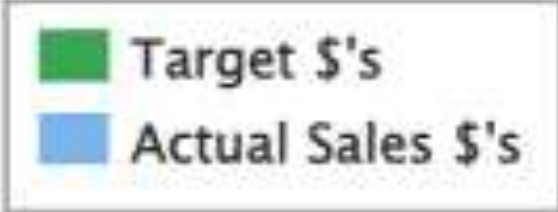
Account Name	Segment	Cat w/Sales	Cat w/Oppt	Acct Tot Sales \$'s	Oppt \$'s
RYERSON UNIVERSITY	Education	28	4 	\$25,464	\$1,348
GEORGE BROWN COLLEGE	Education	33	1 	\$133,062	\$526
GMP SECURITIES LP	Financial	22	5 	\$24,352	\$1,656

Wallet Share: Customer Summary

Show only categories with Target \$'s >

Target Category Opportunity Sales \$'s Compared to Actual Sales \$'s

Customer: VALORIS FOR CHILDREN & ADULTS (UNCATEGORIZED)



Wallet Share: Product Category

Show Customer/Category Opportunities > \$ Search

Category	Sales \$		Potential	Top Selling	Interested/Committed
	Actual	Target	Opportunity \$	Items w/Category	
Facilities : FOOD & BREAKROOM	\$72	\$699	\$627	245	<input checked="" type="button" value="Interested"/> <input type="button" value="Committed"/> <input type="button" value="Not Interested"/>
Supplies : ENVELOPES	\$0	\$300	\$300	67	<input type="button" value="Interested"/> <input checked="" type="button" value="Committed"/> <input type="button" value="Not Interested"/>
Supplies : RETAIL SUPPLIES	\$11	\$392	\$381	115	<input type="button" value="Interested"/> <input checked="" type="button" value="Committed"/> <input type="button" value="Not Interested"/>

**Once you know what
% of Wallet You're Getting...**

How Big Is Their Wallet?

How Big Is Their Wallet?

**How Is Their Wallet
Changing?**

Leveraging Industry Data



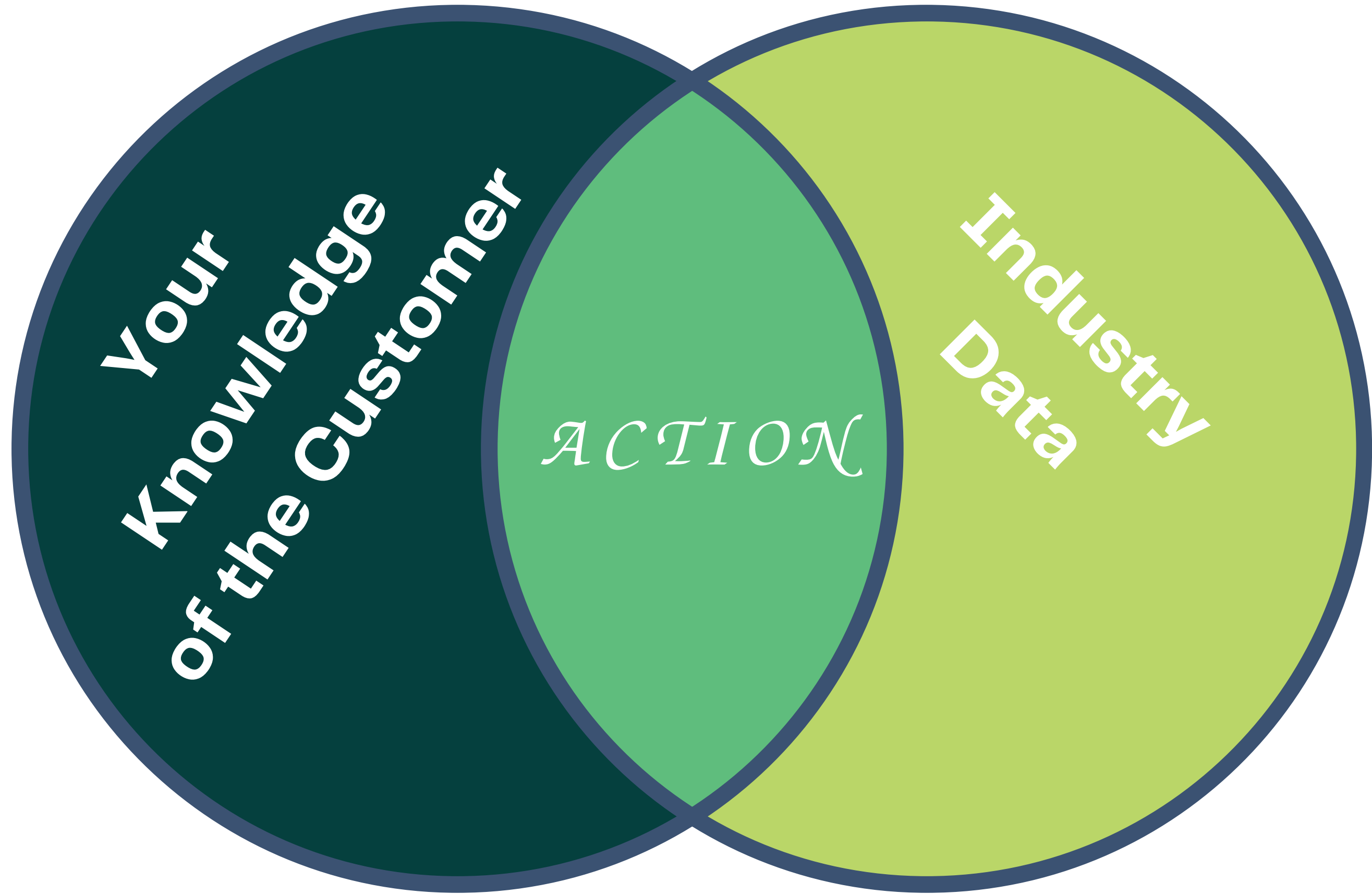
*Your
Knowledge
of the Customer*



*Your
Knowledge
of the Customer*



*Industry
Data*



Your
Knowledge
of the Customer

Industry
Data

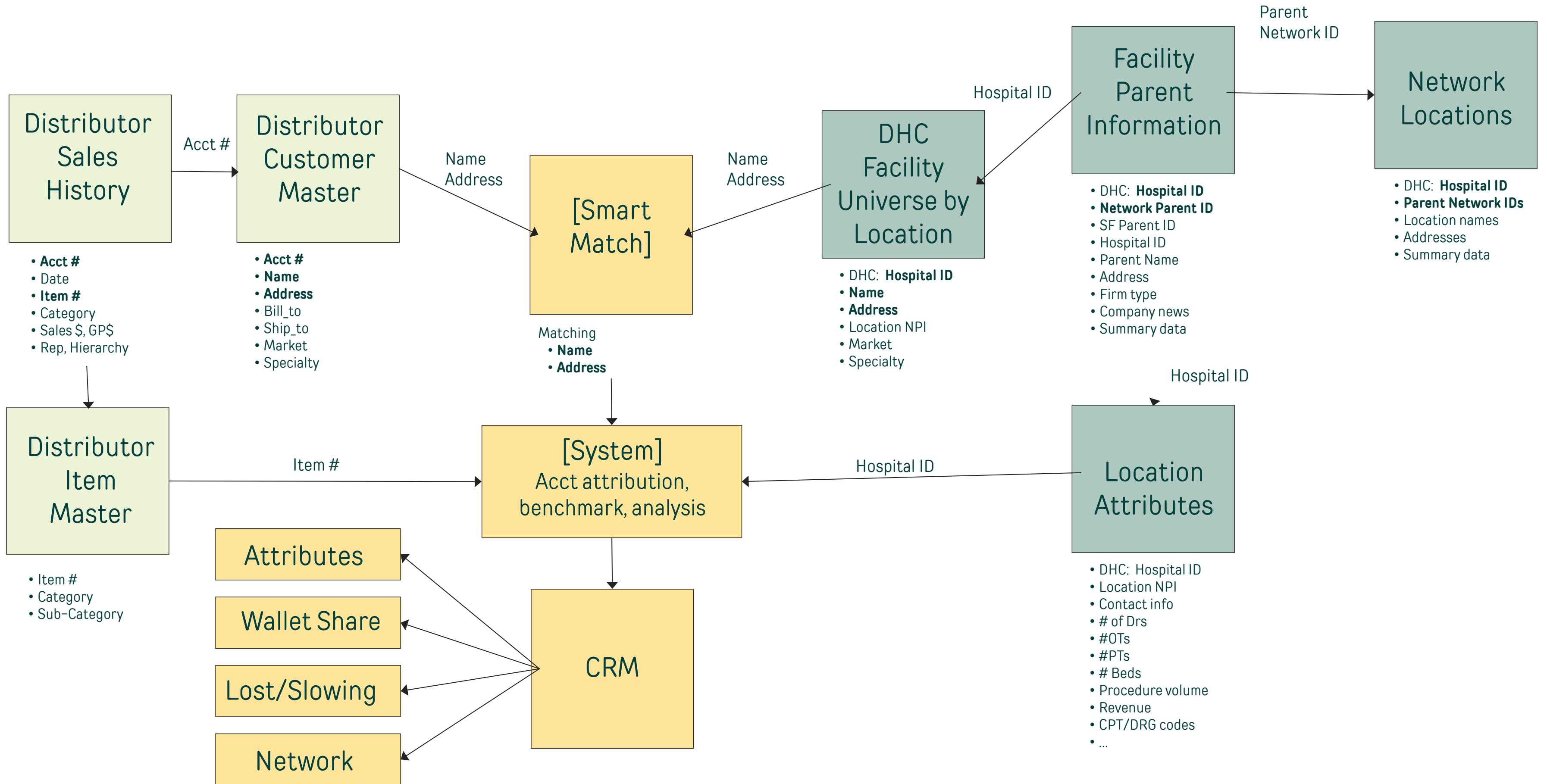
ACTION

Valuable Industry Info

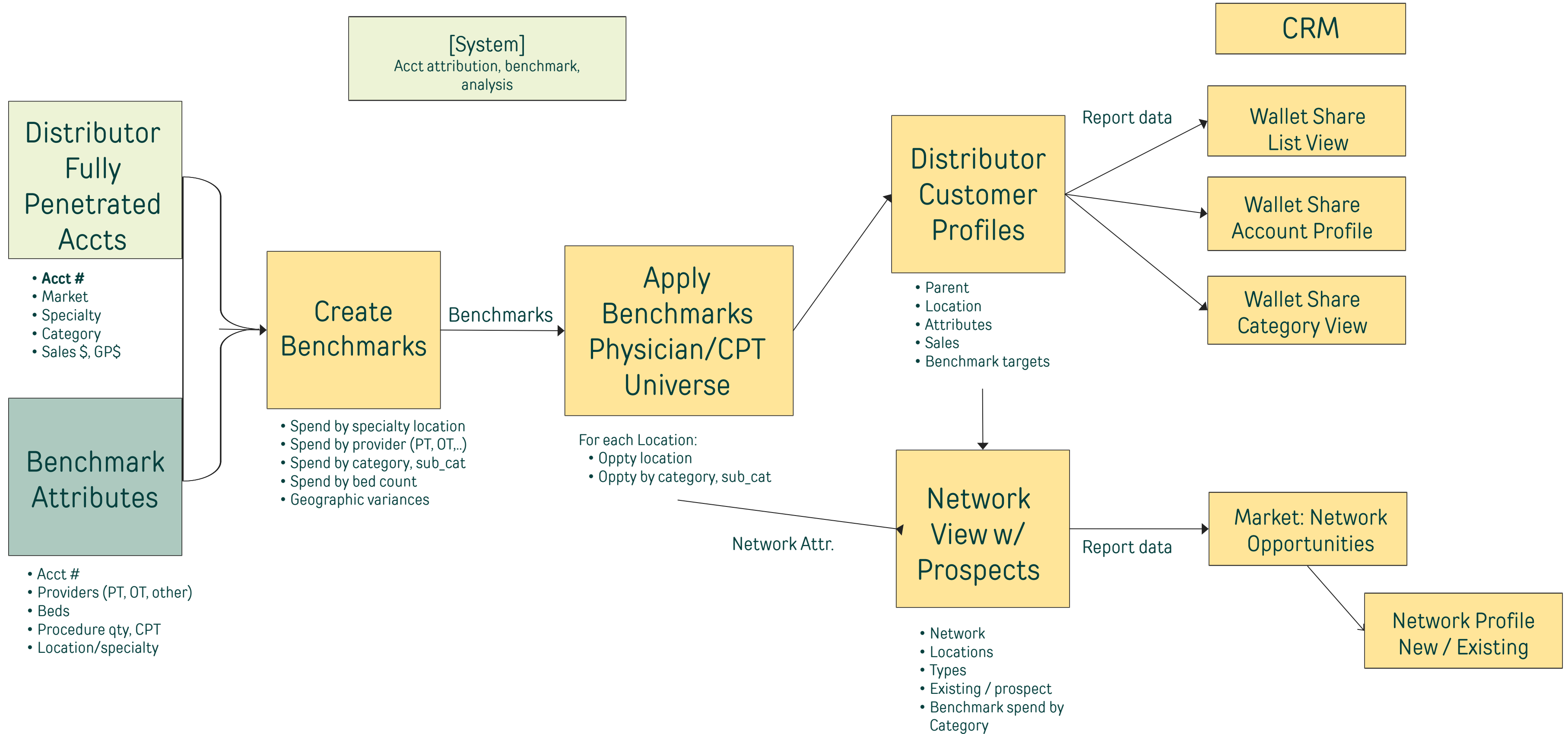
Facility Type
of Physicians
CPT Codes

Key Updates/News

Bringing Data Together



Benchmarking



Parent (Group) / Location Profile

Account:

Parent/Group: Prime Time PT ▼

Location: Prime Time SC ▼

Acct No: 435243

135 W. Main St

Charleston, SC

Profile:

Market: Medical

Specialty: Inpatient

Group Profile:

No. of Dr: 5

No. of PTs: 12

Change in PTs: (-2)

No. of Beds: 21

[Like Facilities <here>](#)

Procedures:

CYTD: 23,550

PYTD: 42,564

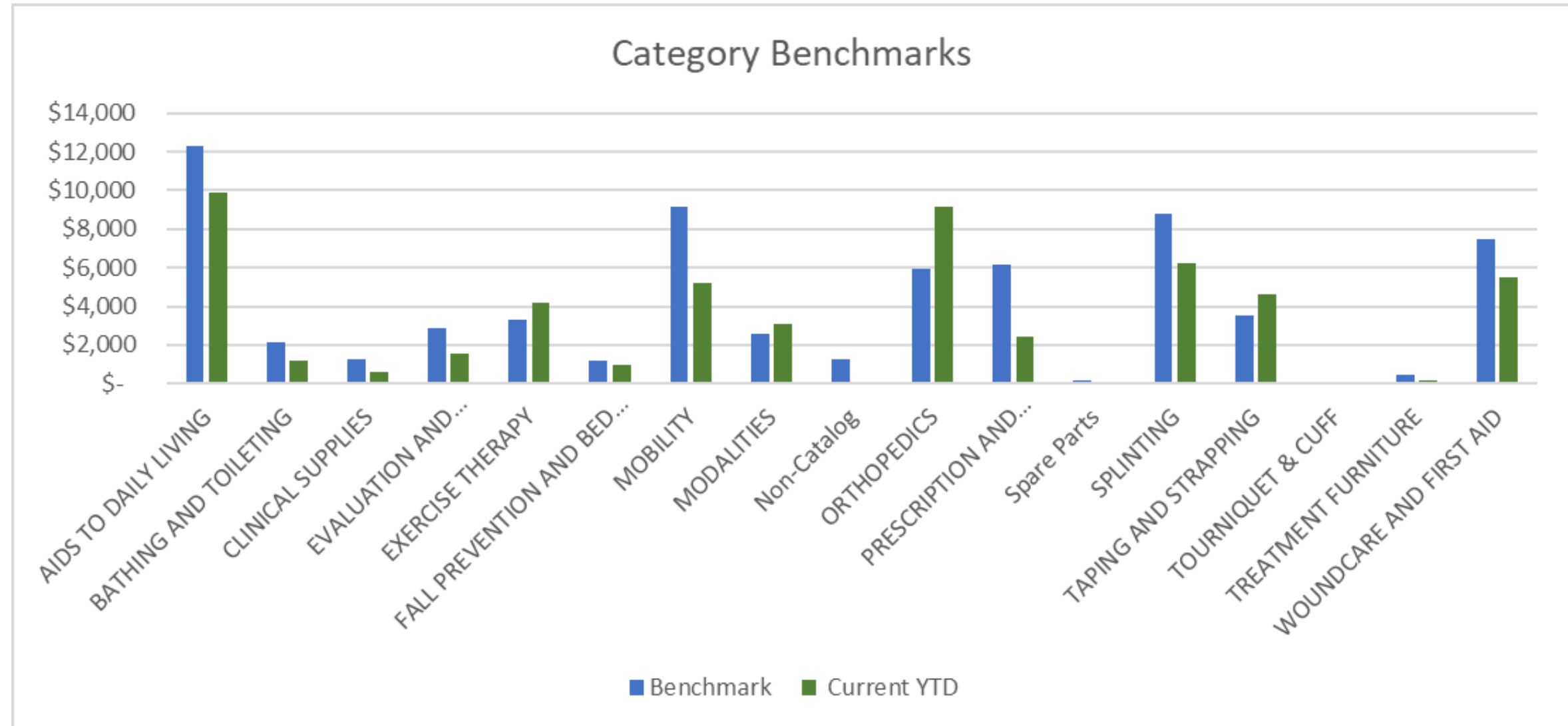
Trending:

Top CPT Codes:

455: xxx ▼

765: xxx

123: xxx



Category Opportunities:

	Sales \$	Gap Oppty \$	Prior Month
Totals:	\$17,880	\$54,874	\$13,669

Product Category	Sales \$	Trend	Gap Oppty \$
Aids to Daily Living	\$9,745	▼	\$2,198
Bathing and Toilets	\$1,109	▼	\$950
Mobility	\$2,548	▲	\$3,550

Gather Data About Customers

- **Surveys (Digital, In-Person)**
- **CRM - Customer Attributes**
- **Social Media, News**
- **Announcements, Reports**
- **Publicly Available Permits**



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Thank you for watching!

To watch the first three installments of the **Enhancing Profitability For Healthcare Distributors Series**, visit <https://www.hida.org/learningcenter>

Part 1: Defining Cost To Serve

Part 2: What Happens Post Sale?

Part 3: Measuring And Tracking Customer Profitability