

# Maximize Every Move With AI:

## An Action Plan For Getting Started



# Agenda

→ Unpacking myths and realities of AI

→ Practical AI applications for distributors

→ Strategies for implementing AI in distribution

→ Q&A / wrap-up



## Speaker

**Kristen Thom** is the Vice President of Product at White Cup. She joined White Cup, formerly Compass Sales Solutions, in 2013.

With a customer-first commitment, Kristen has held roles across implementation, support, development, and customer success. She lives in Boise, Idaho with her husband, two dogs, and extended family.





Unpacking AI

# Myths & Realities



## MYTH 1

# AI Will Replace Human Workers

### REALITY

**AI is designed to augment human capabilities, not replace them.** In distribution, AI can automate mundane tasks, allowing staff to focus on more strategic and creative work.

### EXAMPLE

**AI can automate inventory tracking, but human insight is crucial for strategic decision-making** about inventory levels and supplier relationships.





## MYTH 2

# AI Results are Immediate and Always Accurate

### REALITY

**AI systems improve over time through learning and adjustments.** Initial results might need refining, and the accuracy of AI predictions depends on data quality and model training.

### EXAMPLE

**An AI system for demand forecasting may take several cycles to refine its accuracy,** requiring adjustments and data enrichment for optimal performance.



### MYTH 3

# AI is an All-in-One Solution

#### REALITY

**AI is most effective when integrated with other business systems and processes.** It's a tool to enhance, not replace, existing business strategies.

#### EXAMPLE

**AI can optimize warehouse logistics,** but it works best when integrated with existing supply chain management systems and coordinated with human oversight.



## MYTH 4

# Implementing AI Requires Expert Knowledge

### REALITY

**While AI is a complex field, many user-friendly AI tools and platforms are designed for non-experts.** Distributors can start with ready-made AI solutions that require minimal setup.

### EXAMPLE

**Many distributors are using intuitive AI tools for predictive analytics,** which come with pre-built models and easy-to-use interfaces.



## MYTH 5

# AI is Only for Big Companies

### REALITY

**AI technology is increasingly accessible and affordable.**

Small and medium-sized distributors can leverage AI for various tasks, such as demand forecasting and customer service enhancements.

### EXAMPLE

**Smaller distributors are using AI-driven chatbots to provide 24/7 customer support, improving customer experience without the need for large customer service teams.**





## MYTH 6

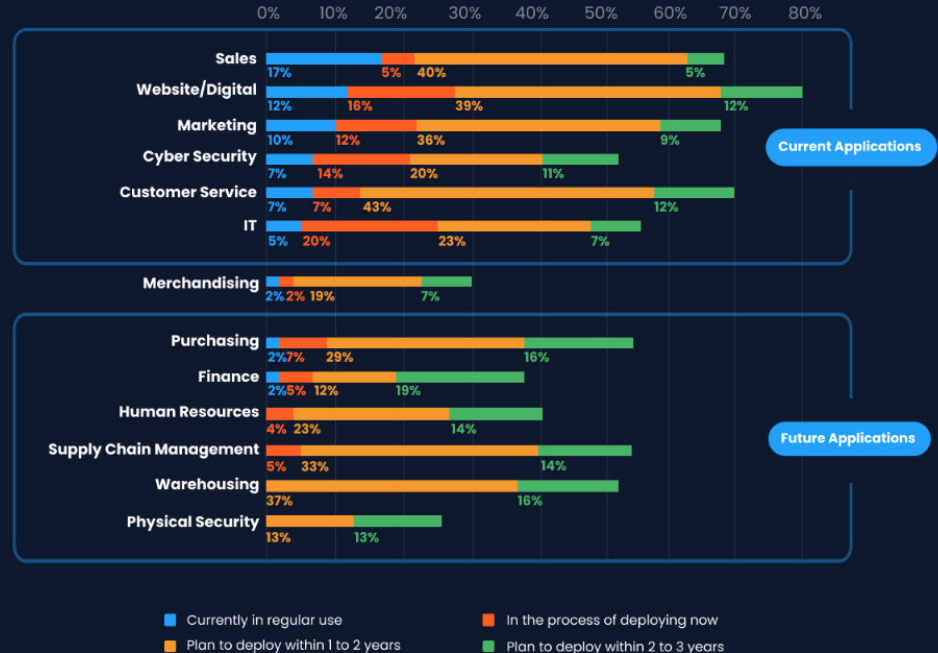
# We're Already Behind; It's Too Late To Catch Up Now

### REALITY

**Only about 1/3 of distributors are using AI today**, so those who act now still have a competitive advantage... But that isn't likely to last. DSG research shows 55% recognize the importance of deploying AI and are making progress.



### Progress Deploying AI





AI in Action

# Practical Examples



# Streamlining Warehouse Operations



amazon

## EXAMPLE

Companies like Amazon have implemented AI-driven robotics systems in their warehouses to optimize the picking and packing process, reducing the time it takes to process orders and improving overall efficiency.

## IMPACT

This technology has been shown to increase productivity and accuracy in order fulfillment while decreasing operational costs.



# Enhanced Demand Forecasting



Walmart 

## EXAMPLE

AI algorithms are used to analyze sales data, market trends, and even weather patterns to predict product demand more accurately.

For instance, Walmart uses predictive analytics to manage inventory levels in real-time, reducing overstock and stockouts.

## IMPACT

Better demand forecasting helps in maintaining optimal inventory levels, reducing waste, and improving customer satisfaction by ensuring product availability.



# Personalized Customer Experiences



## NETFLIX

### EXAMPLE

AI-driven tools are employed to create personalized shopping experiences.

For example, Netflix uses AI to recommend movies and shows based on viewing history, a concept that can be applied in B2B distribution to suggest products to buyers.

### IMPACT

This personalization leads to increased customer engagement, higher sales, and improved customer loyalty.





# Automated Customer Service



## EXAMPLE

Chatbots and virtual assistants powered by AI are increasingly used for handling customer inquiries and orders. They can provide quick responses to common questions, track orders, and even handle basic troubleshooting.

## IMPACT

This automation improves customer service efficiency, reduces response times, and allows human customer service representatives to focus on more complex queries.





The Essence of Practical AI in Distribution

*Uncovering Your*  
**Next Best Actions**

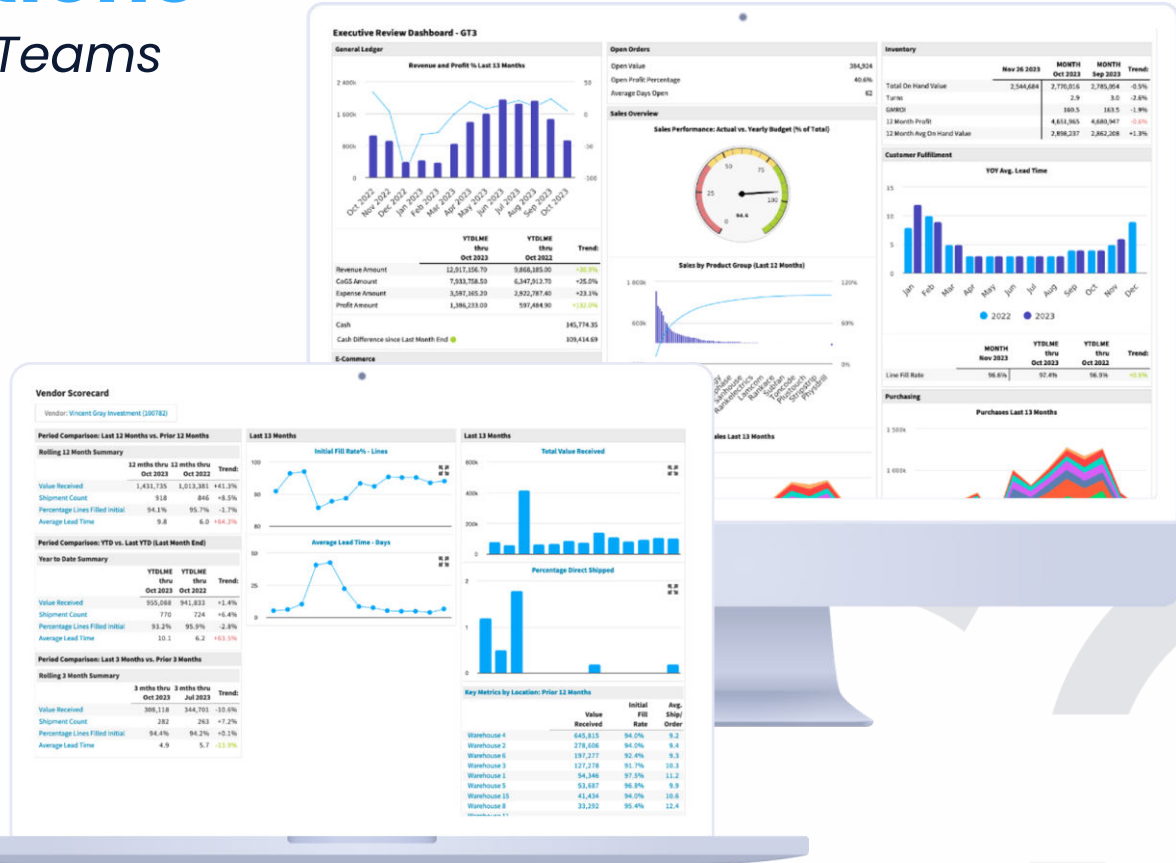


# Next Best Actions

for Distribution Sales Teams

## Smarter selling with Top Related Products

- AI-Integrated CRM Tools
- Immediate Benefits for Sales Reps
- Practical Impact



# Next Best Actions

for Distribution Sales Teams

Seize every opportunity with Buying Cycle Insights AI-Integrated

- Intuitive Alerts for Sales Reps
- Actionable Insights Within Workflow
- Simplified Sales Process

The screenshot displays a CRM dashboard for 'WHITE CUP'. At the top, there are navigation tabs for 'Reports', 'Dashboards', 'Catalog', and 'Hypercube'. A prominent red-bordered alert box is overlaid on the dashboard, containing the following information:

- Due:** Monday January 8, 2024 - 9:00 AM
- Subject:** Upcoming Anticipated Order Date
- Body:** LinkDirect Energy tends to place orders on the second Tuesday of every month. There is an anticipated next order date of Tuesday, January 9th. Reach out to main purchaser to ensure anticipated order is as expected.
- Assigned to:** System Admin | LinkDirect Energy

Below the alert, the main dashboard area shows a data table with columns for 'Sales MONTH', 'Sales 12 mths', 'Invoice Number', 'Line Order Number', 'Invoice Date', 'Request Date', 'Location', 'Sales Rep', 'Order Term', 'Bill To Customer', 'Ship To Customer', 'Product Supplier', 'Product Group', 'Product', 'QTY Ordered', 'QTY Invoiced', and 'Extended Price'. The table contains multiple rows of sales data, with the first few rows showing sales for 'LinkDirect Energy (55007)'.



# Next Best Actions

for Distribution Sales /  
Marketing Teams

## Transform excess inventory into sales opportunities with Dying Stock Campaigns

- Maximizing Inventory Efficiency
- Actionable Data for Sales/Marketing
- Ease of Campaign Execution



WHITE CUP Reports Dashboards Catalog Hypercubes Admin

Columns Save Send Chart Options Library

### Inventory - Dying Stock

INVENTORY Location All Product All Filtered X Expand

	Total		SALES: Units		Trend
	On Hand	On Hand	Shipped	Shipped	
	Value	Qty	12 mths thru	12 mths thru	Units Shipped
	Nov 26 2023	Nov 26 2023	Oct 2022	Oct 2023	
<b>INVENTORY</b>	2,544,684	949,145	3,876,220	4,535,297	+17.0%
Warehouse 7	1,052,941	79,987	61,239	83,616	+36.5%
1060184 - Sofjjoydex	17,114	975	179	71	-60.3%
Buyer	6,200	28	20	9	-69.0%
Product Group	5,033	277	11	2	-81.8%
Product Supplier	2,316	22	83	33	-60.2%
Purchase Class	2,256	381	104	5	-95.2%
Stockable	2,171	100	10	1	-90.0%
	1,917	193	51	13	-74.5%
	1,161	16	59	13	-70.0%
Product 360 Scorecard	916	248	448	93	-80.1%
	596	16	59	14	-78.3%
Product Inventory Scorecard	537	10	19	3	-84.2%
Product Sales Scorecard	532	9	99	14	-85.9%
	506	6	18	7	-81.1%
Create Campaign	379	60	120	23	-80.8%
1060111 - mmax	369	13	209	66	-68.4%
1060220 - Danosofan	316	6	30	7	-78.7%
1208382 - Tvejob					

WHITE CUP | ISI Connections | Sales | Tools | Marketing | Help Portal | Admin | Search for contact, etc.

### Create Campaign

Campaign Name: Dying Stock - 1060184 - Sofjjoydex

List: Recent Purchasers [Create Record](#)

Suppression List(s) [Add Suppression List\(s\)](#)

Email Template: Dying Stock Promo

Note: You can use dynamic variables such as {firstName}, {lastName} or {phone} in your template. When you email a record of the specified type, these will be replaced by the appropriate value.

Type: Email

Send As: Default Mail Sender : "White Cup CRM"

Enable bounce handling?: Inactive

Bounce Handling Account: - select bounce handling account -

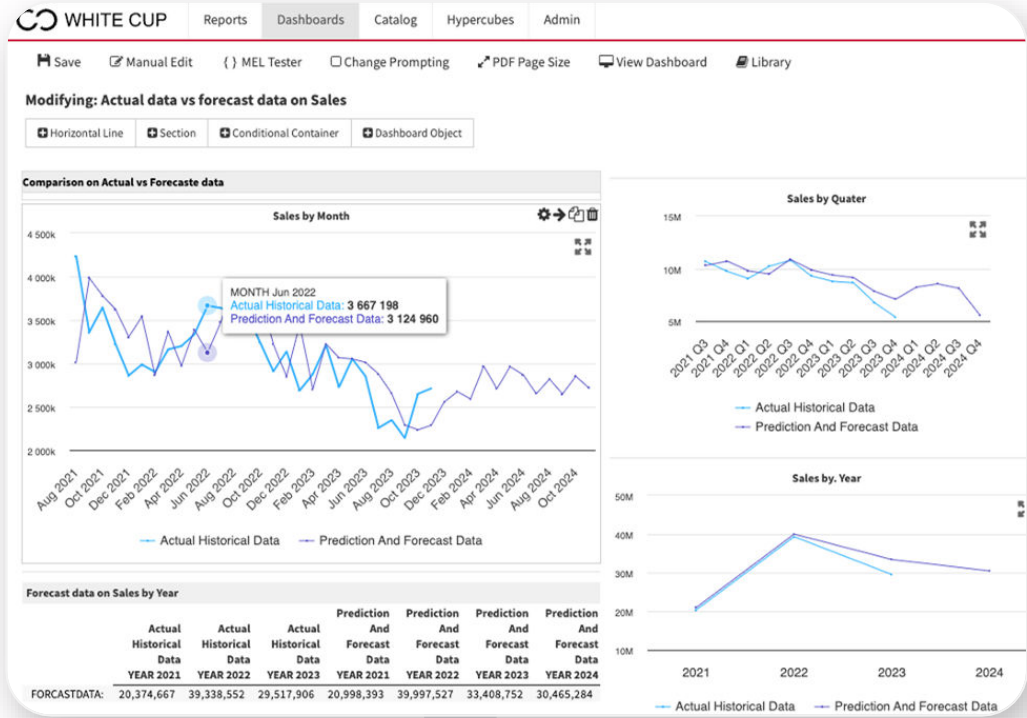


# Next Best Actions

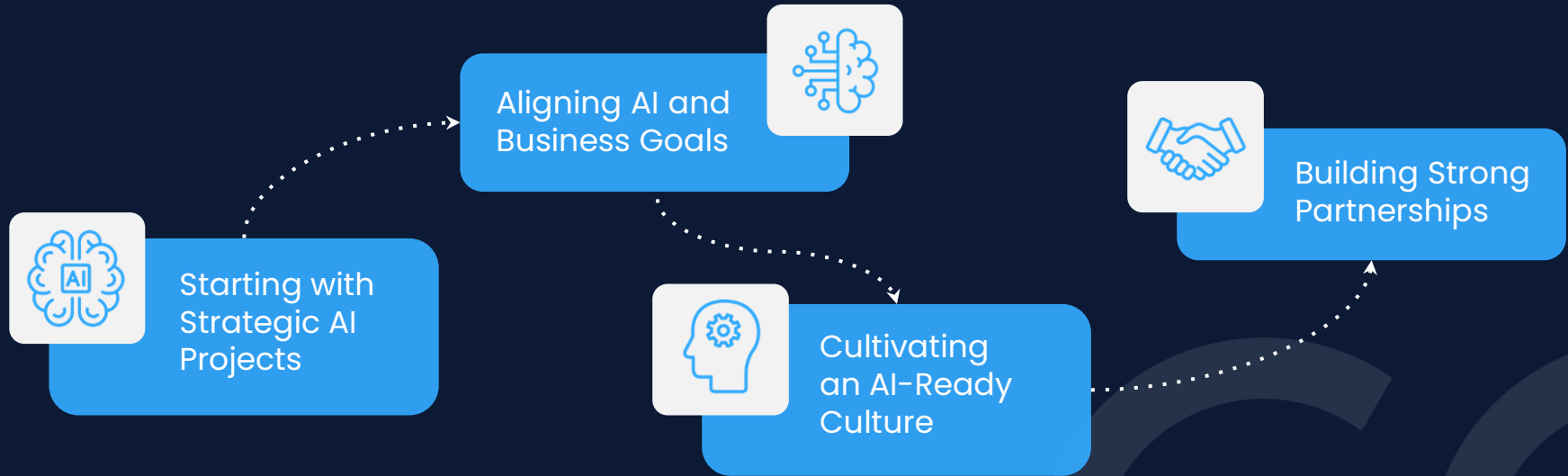
for Distribution Leaders

## Driving strategic growth with Predictive Sales Forecasting

- Strategic Business Planning
- Risk Mitigation and Growth Planning



# Strategic AI: From Alignment to Ecosystem Integration





# Questions?

Learn more at [whitecupsolutions.com/white-cup-ai-next-best-action](https://whitecupsolutions.com/white-cup-ai-next-best-action)

