

Sales Level 10 Biweekly Meeting Agenda

October 14th, 2013

Start Time – 9:00 AM (EST) Schedule for alternate Mondays at 9:00 AM ET

Segue (Personal and Business Best News)

2013 Goals

- 10% YTD national sales growth vs. 2012 (?)
- Decrease number of suppliers on shoe and AFO drop-off lists by (10) each quarter
- Increase average monthly YTD number of suppliers ordering from 1100 to 1136 (?)
- Increase in average monthly YTD of monthly sales per active supplier from \$650 to \$750 (?)
- Increase average monthly YTD gross profit margin from 27% to 28.5% (?)

Scorecard (On Track / Off Track)

- YTD National sales growth vs. 2012 Goal 10% (?)
- Number of suppliers on shoe and AFO drop-off lists Goal: AFO 83 (84), Shoes 73 (116)
- 12-month average number of suppliers ordering Goal 1136 (?)
- 12-month average of monthly purchases by suppliers Goal \$750 (?)

Rock Review - Longer Term To Do List (On Track / Off Track)

Customer / Employee Headlines (Good / Bad Reports, add issues to issues list)

- Start Ups Feedback: North 9 , South 8
- Campaign Feedback: Oct: Patient Retention Slowing down on CSR calls scheduled & completed. 9/30-10/4 13 scheduled 8 completed, 10/7-10/11 8 scheduled, 4 completed.
- Drop Offs Feedback: **Issue**
- MBB discussion **Issue**

Last Meeting To Do List	WHO		
Create tutorial on how to save Medicare compliance documents if using EMR	Josh	N	
Diabetic MBB image to be updated with spacer (Update Perosupport image)	Josh	N	
CDFE. poor circulation drop down. Specificity not noted for all diagnoses (PAD)	Josh	N	
Create cover letter for complimentary shoe & Darco AFO sample sent to customer after 1 on1 meeting	Josh	N	
Verify with Adam or Larry OK to end rental agreement.	Josh	N	
Fill out and post show feedback form from TPMA meeting	Josh		Y
Recommend revisions to Patient Retention program and Pt List for 2014	Josh	N	
Contact Ron at PP to print up generic CDFE patient brochures to be used for customers	Josh		Y
Add Gold note type to suppliers page to identify VIP customers	Rich		Y
Call Dr. Danielson's office to speak with new practice DPM regarding use of SafeStep.	Justin	N	
Obtain feedback to determine specifics of how EMR used for Patient Recall. Specifics from offices who are doing well but not using SS.	Gina, Chris Justin	N	

Review Current Return Policy as compared to Dr. C., Charging for labels, Lack of awareness of easy Returns. Suggestion on how to make even better.	Gina	N	
Talk to Pete about including Patient name instead PO # only on CSR notes. Fax Orders. RS label requests.	Gina		Y
Create Promo Code for CDFE generic brochure mailing to customer with protocol for usage & follow up (Issue)	Gina	N	

Issues List (Prioritize; then Identify, Discuss and Solve – IDS)

Drop Off Shoe Calls. Promote 4th quarter TSP check up. Check for : Any reasons for drop off, Compliance review, Patient List & Recalls, Marking orders dispensed, Removing Dupes, Updating Samples, Marketing Materials. Discussed
**Ask for office website. Add to start up steps. Dr. specific e mail field & website field. Updated contact flier. Rich To Do
Suggestion for Darlene to include several webinar choices when sending e mail blast. CD, JN & GB to switch up presentations. Josh To Do
Feedback on statements received via e mail. Do customers realize this is option? Promotion via website & statement stuffer. E statements more time consuming. E statements will be an option when Great Plains arrives by end of 2014. Josh To Do
Advance promotion of conferences. Josh's upcoming APMA meeting. More effective way to reach customers. Revive the e mail blast approach when regional meeting. To Do Josh
Review cancellation process of OF shoes. Ex: 1316. Response to cancel request taking longer than typical. Shoe shipped after request received. (Chris) Resolved
Catalog roll out date? CDFE patient brochures to be included with cover letter. No roll out. Continue to offer shoe catalogs. Discussed
Back orders w/o backorder notice. PAL #5822 OrthoFeet PO: 809085 Pt: Freddy Brandy. E mail Rich when occurs.
OF backorders. Number has increased. Related to new styles?
Patient List: 1: When customers remove patients who leave/die from the list the order history is deleted. 2: No way to remove patient from list when shoe is not dispensed or returned without deleting patient. #1363- Elison. Rich To Do
MBB campaign: ongoing incentive CSR to suggest webinar prior to scheduled meeting. To Do Gina
Survey & survey results Discussed
WF orders on RX page. Dr info not auto populating
Commission Reports? Sales figures. Will bring up during Manager's meeting
Review of promos & usage

New To Do List	WHO		
Add field for Doctor e mail & practice website	Rich		
Discuss with Darlene webinars & e mail blast	Josh		
Discuss with Pete to advise CSR's to promote webinars in addition to 1 on 1 meetings	Gina		
Ask accounting if e statements too much work or ok upon request	Josh		
Darlene (Keshia to learn) to start e mail promotion for conferences (AAPPm)	Josh		
Change patient list so that order history remains after patient deleted	Rich		
Add new text for "select patient from list" to encourage use of drop down list for WF orders	Rich		

Wrap-up/Feedback:

Suggestions to improve the meeting format?

Next meeting: Monday, Oct. 28th, 9 AM ET

Attendance: Josh 9 , Richard 8 , Chris 9 , Justin 8 , Gina 8

End Time – 10:38 am ET