

Helping your **first client**



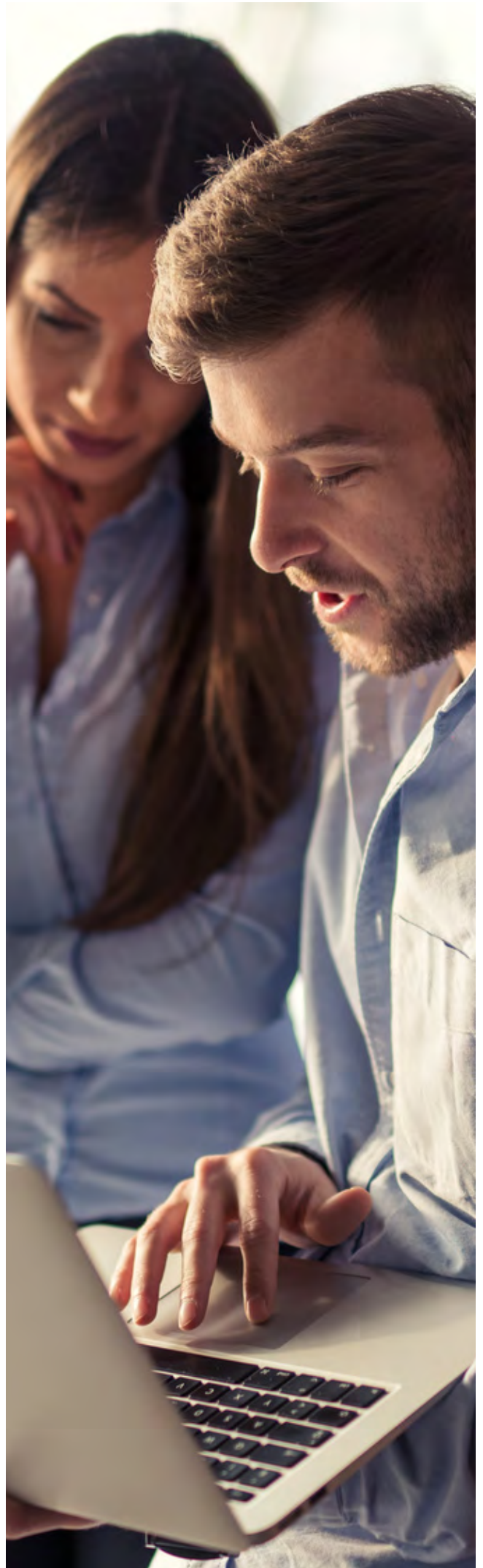
Welcome to Unleashed!

We want to make helping your first business upgrade their inventory management simple. As you follow this simple step-by-step guide, make sure to get in touch with your Partner Manager with any questions or queries you might have.

Here are the four steps to helping your first business upgrade their stock control:

- 1. Learn how Unleashed benefits businesses**
- 2. Spot a client with inventory problems**
- 3. Identify whether they're a good fit**
- 4. Send them your Referrer link**

Let's take a look at each one in detail.



How Unleashed benefits businesses

Types of business

There's a huge range of Unleashed customers, in a wide variety of different verticals — but the factor that unifies all of them is that they are stock-based. Our solution is designed for businesses that live and die on the products they sell, whether they're:



Manufacturers



Distributors



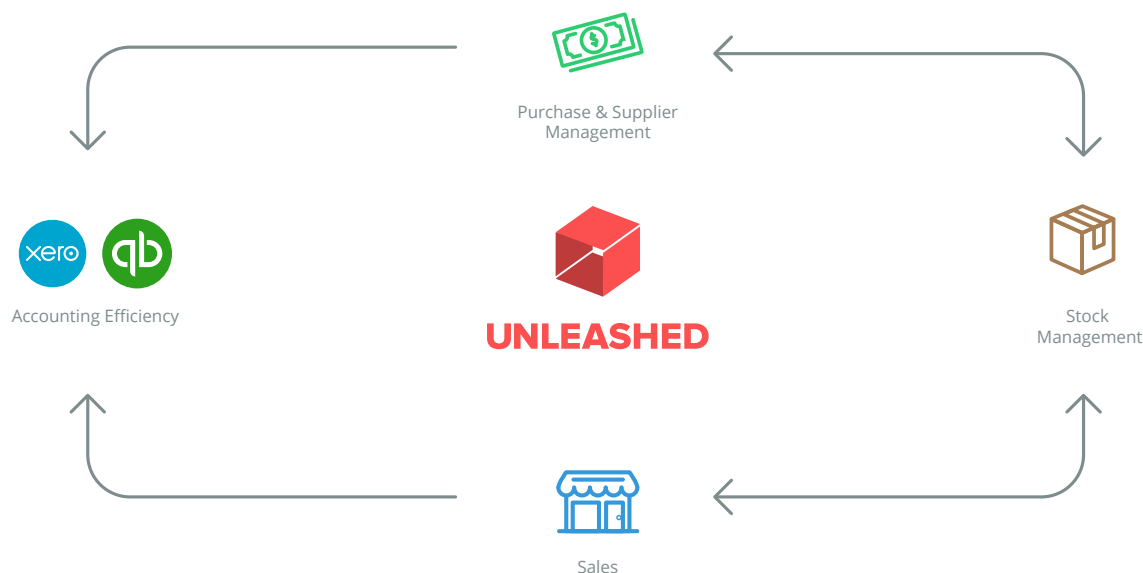
Wholesalers



eCommerce retailers

How businesses use Unleashed

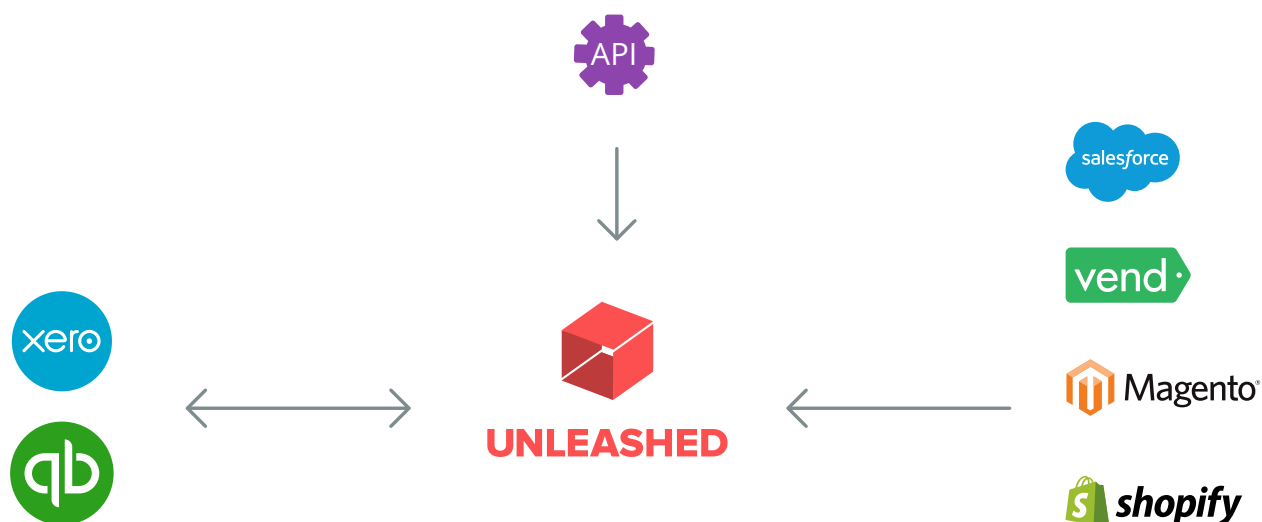
Unleashed may be an inventory management system first and foremost, but it helps businesses across lots of different areas. Here's an overview of what a typical setup might look like.



As you can see, the app covers far more than just stock control. Most businesses also use Unleashed to track their sales, purchases and suppliers — and thanks to the launch of the B2B eCommerce Store, they use it to sell directly to wholesale customers as well.

Integrations

For many businesses, inventory management sits at the core of their component solution, with their accounting software taking a vital but secondary role. Unleashed integrates with a wide range of apps to make this easier than ever.



"We save around 35 hours per week using Unleashed, which equates to a 15% reduction in admin costs"

Hilditch and Key



"Our sales grew by 200%. We were actually able to spend time on sales and customers"

Tribe of the Tree

Spotting a client with stock problems

The early signs to watch out for

Knowing when a business needs cloud inventory management can seem tricky at first — especially if you aren't deeply involved in their day-to-day operations. However, there are three key signs that we've found will often indicate that a client could be in trouble.

1. Messy management reports

Figures which don't look right are often symptomatic of poorly managed inventory. Nonsensical stock adjustments, even more so.

2. Slowing sales

Sales can slow for a number of reasons, but many Unleashed customers say they lost sight of sales because they were spending too much time managing inventory.

3. Lack of clarity over business performance

How much profit did they make last year? What's their best performing product? If a client isn't sure, it may be because they don't have easy access to stock data.

Five questions to ask

- **Do you know what's in stock right now?**
If they don't, then they probably need an inventory management upgrade.
- **How is your business performing?**
Cloud systems enable businesses to analyse performance in detail.
- **How many spreadsheets do you currently use to manage inventory?**
A complicated spreadsheet setup can cause problems.
- **How much time and manpower do you currently spend managing inventory?**
If your client thinks it's too much, they're probably right.
- **How do you currently manage your stock?**
Their exact issue will depend on their current inventory system.

Can Unleashed help?

Now it's time to find out the exact problem your client is facing — so you can see whether adopting Unleashed will solve it. Much will depend on their existing inventory system. Here are some of the common problems that businesses can solve by adopting Unleashed.

How do they currently manage inventory?		
	Offline systems Excel, pen & paper	Accounting software Xero, Sage 50 Professional
Common problems that Unleashed can solve		
No accountability	✓	
Can't track inventory costs	✓	
No idea what's in stock	✓	
Can't scale	✓	
Can't integrate systems	✓	
No concurrent users	✓	
Stockouts/overstocking	✓	✓
Lost stock	✓	✓
Inaccurate margins	✓	✓
Problems selling multichannel	✓	✓
Can't track by serial number	✓	✓

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How do they currently manage inventory?

Offline systems

Excel, pen & paper

Accounting software

Xero, Sage 50 Professional

Common problems that Unleashed can solve

Audit trail issues	✓	✓
Can't manage multiple warehouses	✓	✓
Can't sell stock at multiple price points	✓	✓
Spending too much time on inventory admin	✓	✓
Can't deal with complex orders	✓	✓
Can't manage manufacturing	✓	✓
Can't dropship	✓	✓
Transaction limits		✓

TOP TIP

*The easiest way to tell if we're a good fit for your client is by answering the 10 questions in your free inventory requirement calculator. You can find it by logging in to your **Partner Portal**.*

Five questions to ask

If the answer to any of the following questions is yes, then your client is almost certainly going to benefit from Unleashed.

- Do you have a traceability requirement (i.e expiry dates)?
- Do you use a third-party logistics provider?
- Do you need to report on margins by product line, customer type, channel or salesperson?
- Do you hold stock in multiple locations, or sell it at multiple price points?
- Do you sell across multiple channels (B2B and B2C)?

What if my client already has an inventory management system?

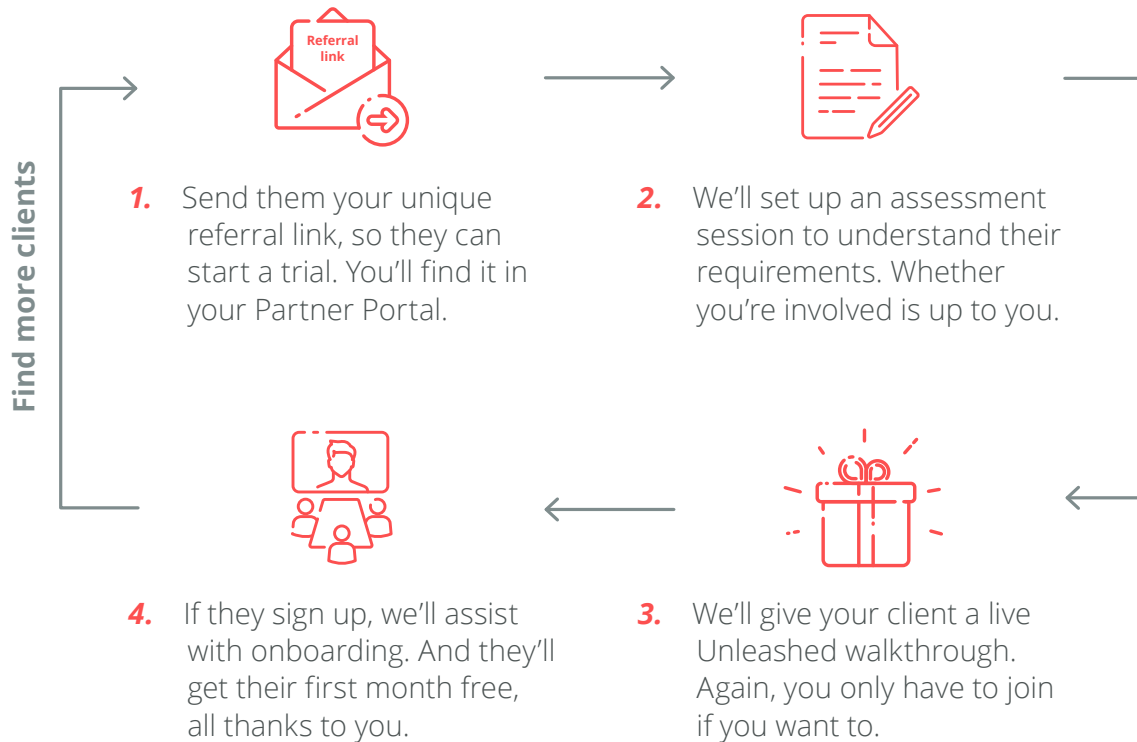
Just because your client already has a system in place to manage inventory, it doesn't mean that Unleashed couldn't be a better solution. Sometimes their current system isn't a good fit for their needs, or they aren't receiving the training and support they need to make the most of it. The Inventory Requirement calculator in your **Partner Portal** should help you assess whether Unleashed is a better fit.

Still unsure if they're a good fit?

Get in touch with your Partner Manager — they're an expert in spotting businesses that need Unleashed.

Referring your client to us

We follow a 4-step referral process to ensure that your client gets an inventory management system that matches their business requirements. You can decide your level of involvement throughout.



What next?

Once your first client is up and running, it's time to find the next one! Analyse which businesses might benefit from cloud inventory management, run their set up through our inventory calculator, and send them your unique referral link.

With your first referral ready to go, getting the next one is easy. And remember, we'll always be on hand to help out.

Log in to your Partner Portal to

Get started

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