Customer IQ

Stop reacting to churn.
Start predicting it.

AI-POWERED CUSTOMER INSIGHTS WITHIN SALESPAD FOR GP

For distributors, customer health isn't just a metric—it's the pulse of the business. Managing thousands of SKUs and hundreds of accounts makes it impossible to manually track every shift in behavior. Without a dedicated intelligence tool, critical questions often go unanswered until it is too late:

- **Profitability:** Which customers are truly contributing most to our bottom line?

- **Retention:** Which accounts are showing early signs that they might stop buying?

- **Risk:** Are our most valuable customers at risk of leaving us right now?

- **Resource Allocation:** Which accounts are worth the time and financial investment to save?

Customer IQ for SalesPad for GP identifies shifting patterns in your Dynamics GP data to flag at-risk accounts. By applying AI to your sales transaction data, it quantifies customer health so your sales team knows exactly which accounts require immediate attention before they result in lost revenue.

## Identify Early Warning Signs with Predictive Churn

Most businesses discover a customer has left only after a long period of silence, making recovery nearly impossible. Customer IQ utilizes machine learning to flag shifting customer purchasing patterns and assign a **Churn Risk Score** (minimal to high) to every account. This allows your team to action at-risk accounts while the relationship is still active, turning potential losses into proactive revenue saves.

Target Your Most Profitable Opportunities with Smart Segmentation

Treating every customer the same often erodes your bottom line by allowing high-maintenance, low-margin accounts to consume more in resources than they generate in profit. Customer IQ solves this by automatically grading accounts into **ABCD segments** based on their actual contribution to your margin. With these scores visible on every customer card and sales order, your team can prioritize top-tier accounts and apply specialized automatic validation or pricing enforcement to lower-tier segments.

Bridge the Gap Between Data and Action Through Automated Outreach

Sales reps often spend too much time analyzing data to decide who to call, leading to inconsistent follow-up and missed opportunities. High-risk triggers automatically generate outreach tasks and suggestions that can be added to a rep's daily schedule in SalesPad Today. This moves your sales team from analysis to execution, ensuring that retention efforts are structured, measurable, and integrated into their daily routine.
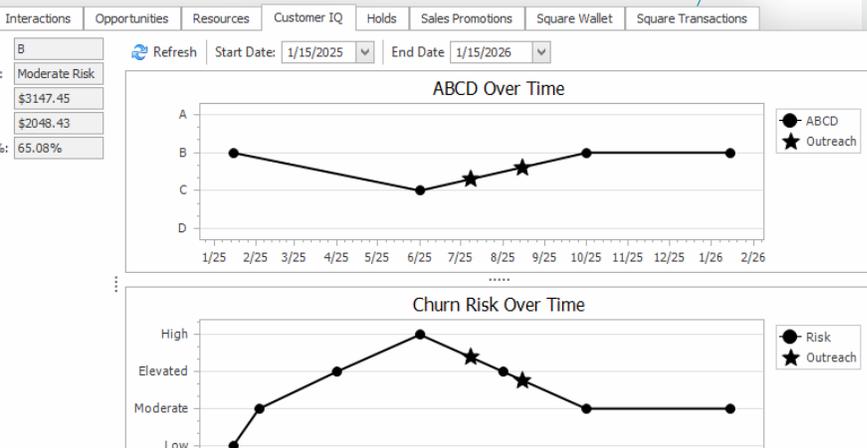
Monitor Relationship Trends with Advanced Reporting

Static health scores don't tell the whole story; you need to know if a customer relationship is improving or deteriorating over time. A dedicated Customer IQ tab and customizable dashboards visualize current and historical shifts in ABCD and churn risk metrics. Managers gain the long-term context needed to audit the effectiveness of outreach efforts and identify macro-trends across the entire customer base.
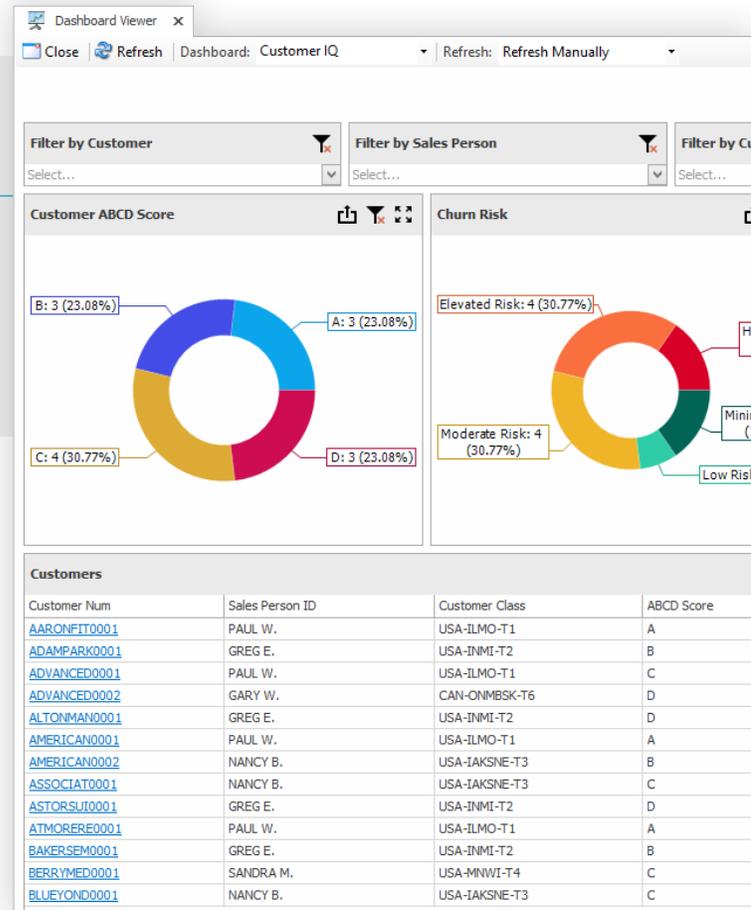
CUSTOMER IQ FEATURES

Proactive Outreach & CRM

Customer IQ automates retention by transforming churn risk data into actionable CRM tasks, delivering outreach suggestions directly to sales reps' daily schedules for immediate follow-up.

Structured Outreach — Automatically suggests who to call and helps sales teams track their follow-ups.

HubSpot Syncing — Connects customer health data to HubSpot so businesses can run targeted marketing campaigns based on customers' risk level.

AI-Powered Predictive Churn

Uses AI to spot customers likely to stop buying before they actually leave.

Risk Scoring — Rates customer risk from "minimal" to "high" based on their ordering behavior.

Advanced Workflow & Logic

Leverage health and value metrics as automated workflow triggers to instantly route documents, flag high-risk accounts, or apply specialized business logic based on real-time customer data.

Workflow Routing — Exposes health and risk metrics as configurable workflow data points, enabling automated rules to flag, route, or apply specialized handling to orders based on a customer's calculated churn and profitability data.

ABCD Segmentation

Groups customers into four categories (A, B, C, and D) based on their monetary contribution to the business.

Dynamic Classification	Segments customers based on their monetary contribution to margin (or sales).
Strategic Focus	Identifies top customers (A & B) to protect, and low-profit accounts (C & D) that may benefit from price increases or corrective action.
Automated Updates	Customer classifications are reassessed regularly (e.g. weekly) to ensure your most vital financial decisions are always based on the freshest sales data.
Customer Card Visibility	Provides a snapshot of current ABCD and churn risk within the customer card.
Historical ABCD and Churn	Tracks how a customer's health and risk levels have changed over time, including notes on past sales outreach.
Sales Order Visibility	Lets sales users reference the customer's ABCD and churn risk directly on each order for informed decision-making.
Directed Picking Integration	Uses ABCD scores and churn risk in Inventory Manager to automatically prioritize which orders the warehouse should pick and pack first.
Mobile Sales Visibility	Gives on-the-go sales reps access to customer health and risk data through the SalesPad Mobile app.

Reporting & Historical Trends

Monitor long-term health and profitability through dedicated tracking tabs, customizable visual dashboards, and automated reports that visualize shifts in customer scores and retention patterns over time.

Configurable Quick Report	Provides a ready-to-use report for reviewing customer ABCD and churn risk that can be configured and integrated into existing quick reports.
Configurable Visual Dashboard	Offers an interactive, high-level view of the entire customer base's health with easy filtering options.