HOW TO USE SPEND MIX ANALYSIS - DESKTOP

This guide will show you how to use the Spend Mix Analysis feature within sales-i.
This feature allows you to view how much a company is spending in a certain product area against your market averages, enabling you to view potential sales improvement areas.

01 Use the Quick Search bar to find the account you would like to view and click the green **Search** button.
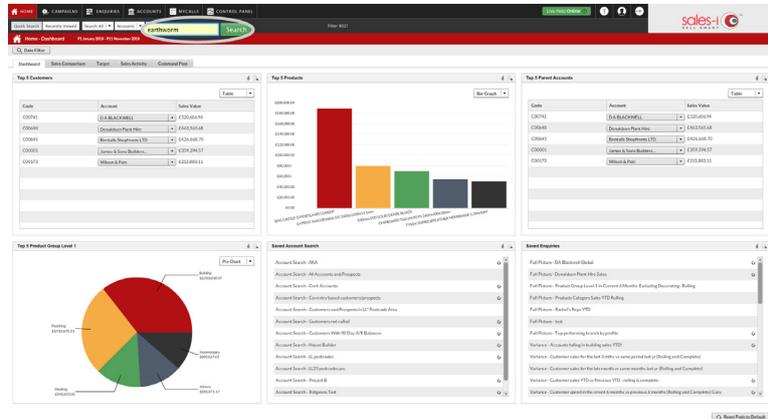
02 Select the account you would like to view so that they turn green and click **Dashboard**.
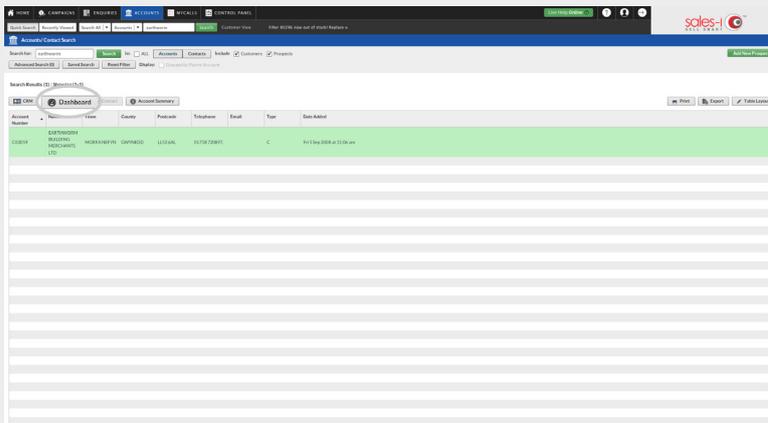
03 The companies dashboard will now appear showing different information about your chosen account.

To view the companies Spend Mix Analysis. Click the **Spend Mix Analysis** tab.
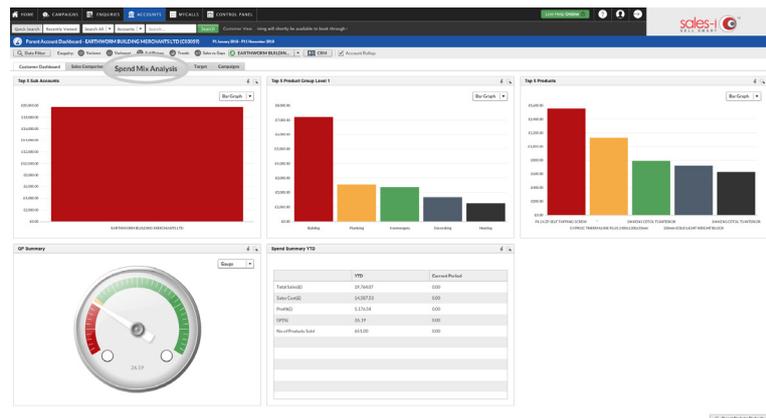
04 You will now see a Spend Mix Analysis chart and below that a table. The bar shows the amount spent ytd by your selected company on that particular **Product Group**. The line shows the **Market Average**.

The Market Average is the average of all of your accounts in sales-i that have spent money in your selected Product Group *e.g. Plumbing* and shows whether your selected company has spent more or less against this average.

If the table below shows a red downwards arrow for any Product Group, this could be an area for your sales rep to push sales in for that customer.

*Please Note: You can change the analysis dates by selecting **Date Filter** on the top left hand side.
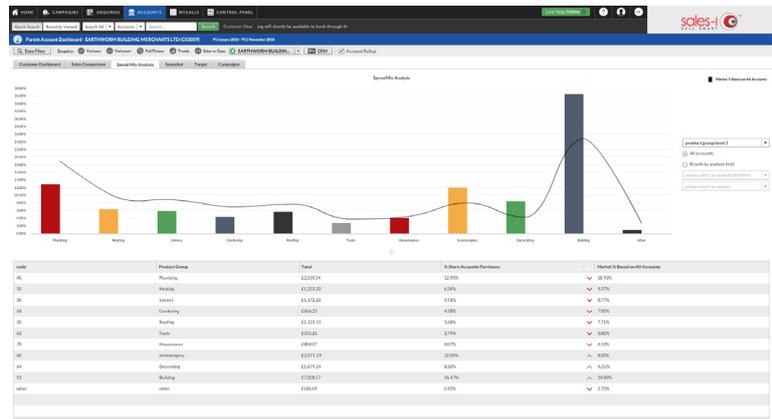
05 By default you see Product Group Level 1 products.

To view other Product Group Levels, click the drop down options on the right hand side of the chart and select a different **Product group level**.
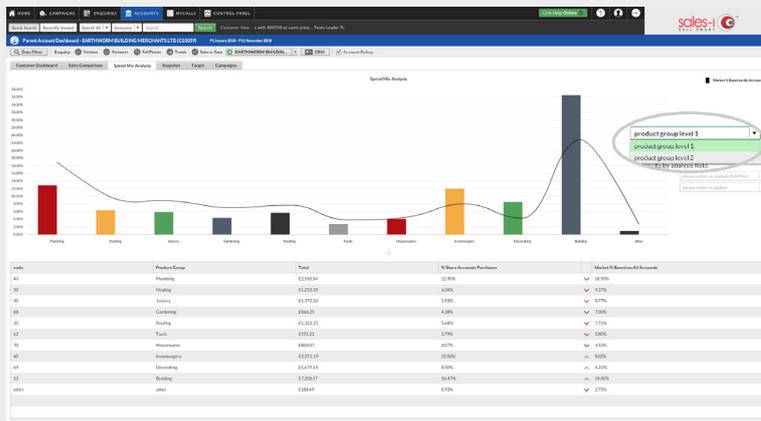
06 Your market average figure, (the line graph), is based on all of your accounts by default.

If you want to change the market average figure, for example to see the market average for these product groups based on Sales Territory, click the **Results by analysis field** button. This will reveal more drop down options.

These further options relate to the green customer analysis bubbles that your company has enabled. Options may include Branch, Buying Group, Sales Rep or Sales Territory.

For example, you could select **Sales Territory** and select **Midlands** to see if this company is above or below the market average compared to all companies in that territory.