



CLIENT XYZ + RUSH ORDER

Quarterly Business Review - Q1 2023



RUSH ORDER
FLEXIBLE FULFILLMENT SOLUTIONS



ATTENDEES

CLIENT XYZ

1

Jane Doe

Logistics Manager

2

John Doe

VP of Customer
Experience

3

Janet Doe

Director of Operations

4

Joe Doe

Sr. Mgr, Accounting

RUSH ORDER

5

Delana Schroeder

Project Manager

6

Brooke Dorsey

Head of Account
Management

7

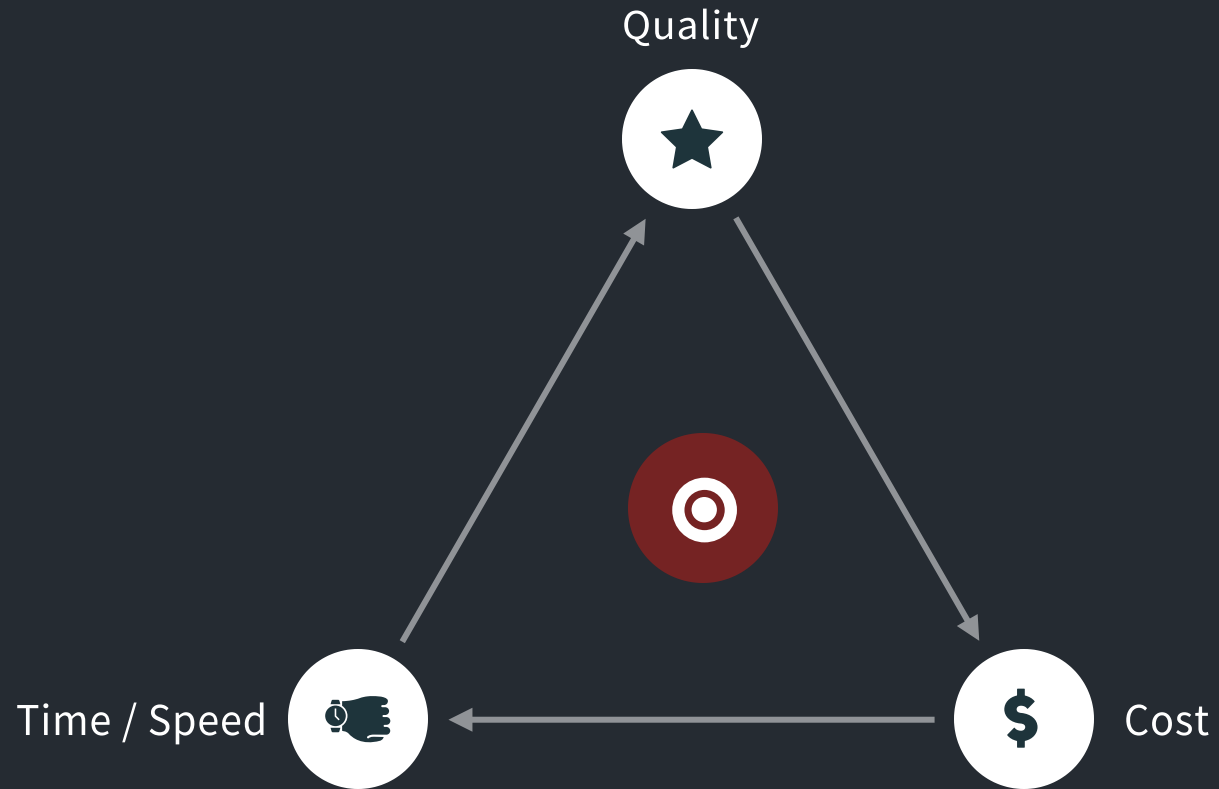
Dana Madlem

Vice President - Services



WHY A QBR?

Ongoing QBRs are one of the tools we use to help optimize Rush Order's performance, add value to XYZ's business, and strengthen our partnership.



AGENDA

1 Attendees

2 Relationship Overview

Review Objectives

3 Review

Services in Use

Completed, Outstanding & New Items

4 Operations Overview (Metrics)

Outbound Order Volume

Inbound Shipments

Returns

Cycle Count Results

Errors/Areas for Improvement

Value Added Services - Projects

Dashboard

Communication

Spend By Category

5 Planning - Road Map

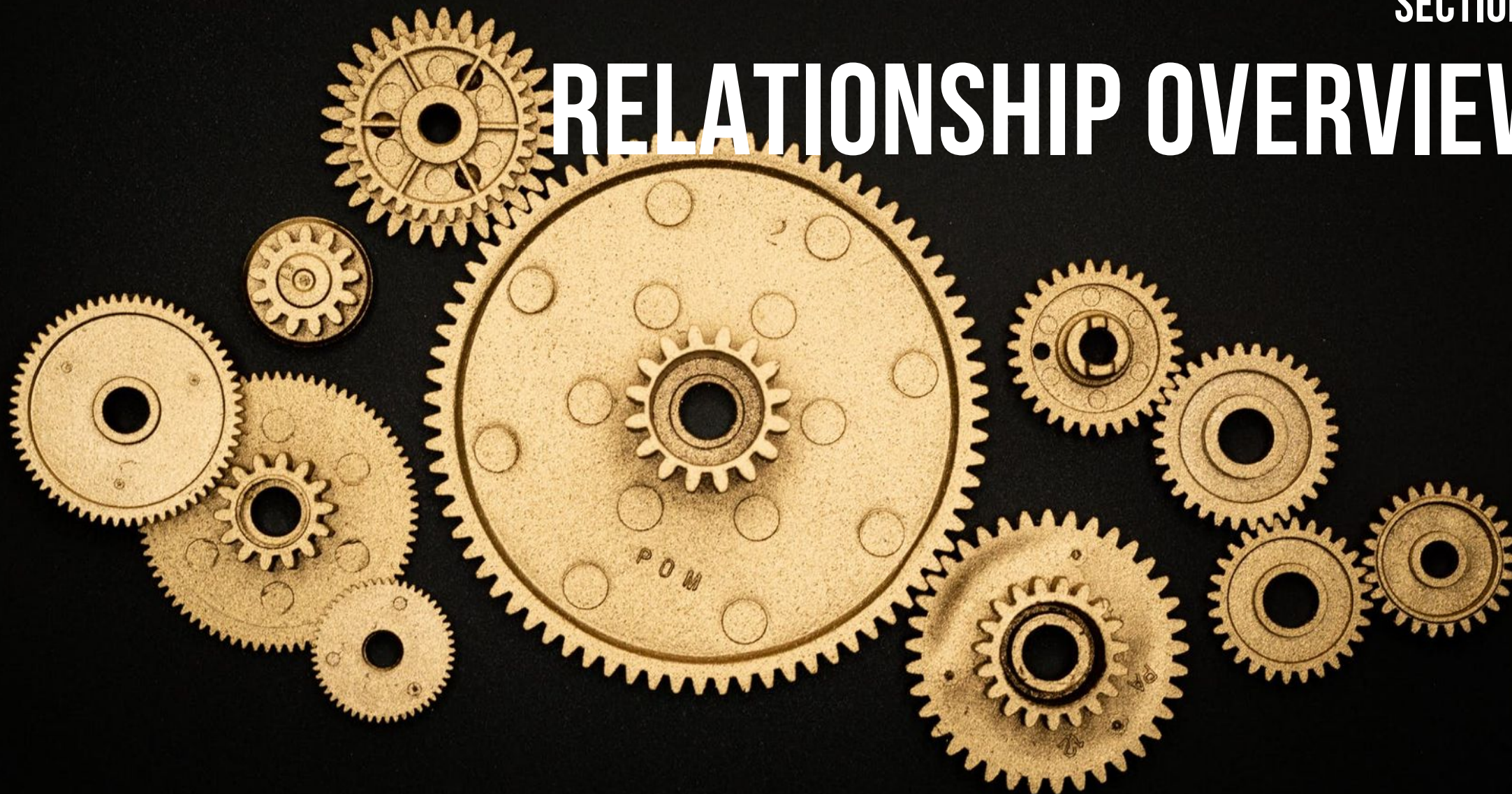
Cost Savings & Opportunities

Roadmap

6 Feedback & Next Steps

SECTION 1

RELATIONSHIP OVERVIEW



RUSH ORDER'S OBJECTIVES



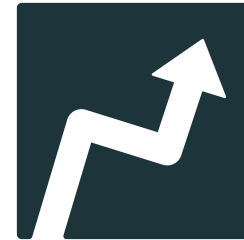
Deliver a Great End Customer Experience

Commit to delivery expectations and provide great customer support.



Inventory Accuracy

Maintain inventory accuracy through operational quality control, regular inventory counts, and secured facilities.



Value and Cost Controls

Manage, minimize, and drive down your costs through continuous process improvements. Take advantage of opportunities to grow, scale, and add value.



Partnership

Work closely with the Hello Heart Team to learn and execute more efficiently. Continue to build our relationship and move the business forward.

XYZ'S OBJECTIVES



Insert your company mission and/or
objectives and/or strategy here

A photograph of a car's side-view mirror. The mirror is in the foreground, reflecting a desert landscape. The reflection shows a road, a body of water, and mountains in the distance. The text 'SECTION 2' is overlaid on the reflection.

SECTION 2

REVIEW: Q1 2023

SERVICES & WAREHOUSE LOCATIONS IN USE

- ✓ Inventory Management
- ✓ Fulfillment - B2C
- ✓ Reverse Logistics
- ✓ ERP Integration / API
- ✓ Customer Support Assistance / Transit Dashboard
- ✓ VAS / Special Projects
- ✓ End User Customer Support

- ✓ California
- ✓ New York
- ✗ Ohio
- ✓ Canada
- ✓ Europe
- ✓ UK
- ✗ Asia
- ✗ Australia



COMPLETED, OUTSTANDING & NEW ITEMS - IT RELATED

Completed

-
-
-

Outstanding

-
-
-

Ongoing

-
-
-




SECTION 3

METRICS

INSERT YOUR 3PL SCORECARD HERE

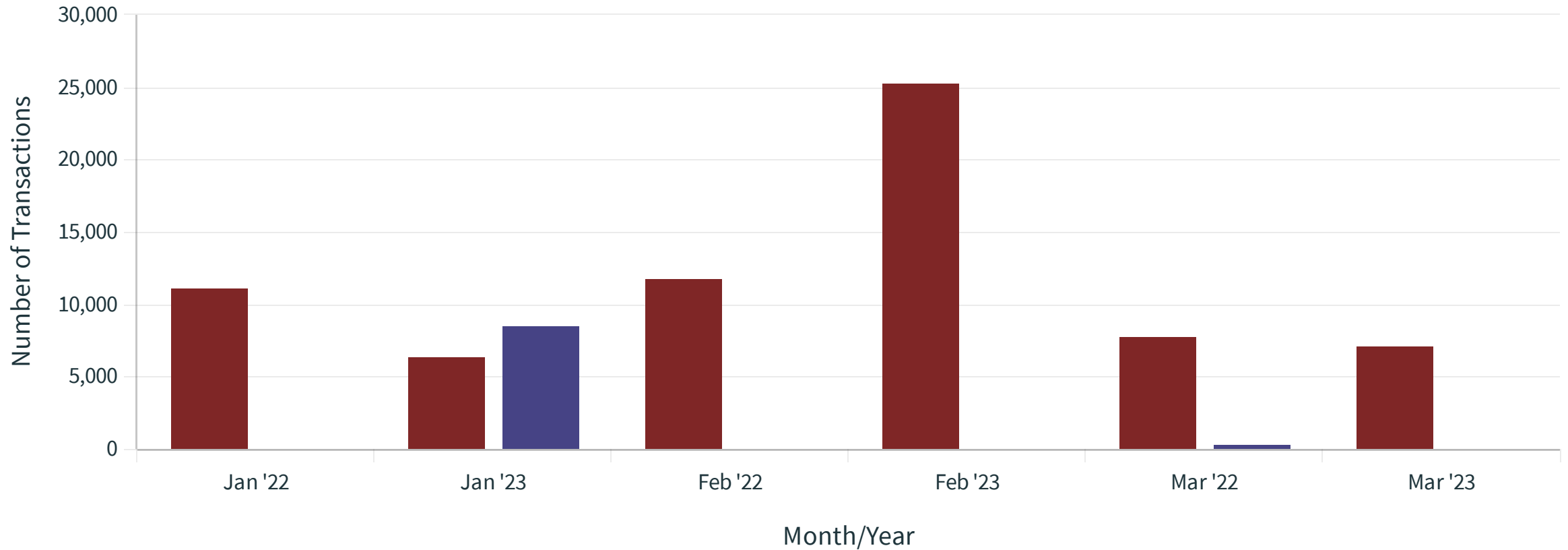
Download this template here

					
Vendor Scorecard		Date:			
SCORE DEFINITIONS					
5 = Constantly exceeds expectations					
4 = Meets and exceeds expectations					
3 = Meets expectations					
2 = Requires improvement or additional assistance					
1 = Failing to perform - corrective action plan required within 5 days					
OBJECTIVES	RATING	WEIGHT (%)	ADJUSTED VALUE	COMMENTS	
OUTBOUND QUALITY	Accurate order capture	5	2.94%	0.15	
	Accurate shipment of correct items	5	2.94%	0.15	
	Accurate inventory (cycle count results w/minimum variance)	5	2.94%	0.15	
	Provides appropriate packing materials	5	2.94%	0.15	
	Demonstrates ability to ship via desired carrier & location	5	2.94%	0.15	
	Demonstrates ability to ship within desired time of order receipt	5	2.94%	0.15	
	Accurate reporting / integration for revenue recognition	5	2.94%	0.15	
INBOUND QUALITY	Provides proper and accurate receiving receipts	5	2.94%	0.15	
	Demonstrate ability to receiving goods properly into inventory	5	2.94%	0.15	
	Demonstrate ability to receive and process product returns	5	2.94%	0.15	
AGREEMENT	Complies with terms of service agreement	5	2.94%	0.15	
COMPLIANCE	Complies with national, local, and state legal requirements	5	2.94%	0.15	
	Takes environmental responsibility / engages in ethical sourcing	5	2.94%	0.15	
	Complies with national, state, and local safety requirements	5	2.94%	0.15	
	Complies with client's security standards	5	2.94%	0.15	
	PCI compliant for transaction processing	5	2.94%	0.15	
OVERALL SERVICE	Provides real-time inventory and order status information	5	2.94%	0.15	
	Capacity for scalability	5	2.94%	0.15	
	Sends alerts about issues or concerns in a timely manner	5	2.94%	0.15	
	Account management is effective, timely and efficient	5	2.94%	0.15	
	Completes product kitting / Value Added Services timely & accurate	5	2.94%	0.15	
	Provides prompt technical assistance for order issues	5	2.94%	0.15	
	Availability of reporting dashboard	5	2.94%	0.15	
Handles complaints efficiently and correctly	5	2.94%	0.15		
COST / PRICING	Offers the most competitive cost for goods, services, and freight	5	2.94%	0.15	
	Provides consistent pricing with minimal change	5	2.94%	0.15	
	Communicates price estimates for projects in advance	5	2.94%	0.15	
	Suggests and implements cost-reduction ideas	5	2.94%	0.15	
FINANCE / ACCOUNTING	Sends invoices and reporting in a timely manner	5	2.94%	0.15	
	Sends easily to understand & reconcile invoices / reports	5	2.94%	0.15	
	Accounts for inventory transfers & movement correctly	5	2.94%	0.15	
	Provides reasonable payment terms	5	2.94%	0.15	
	Invoices accurately	5	2.94%	0.15	
	Reconciles issues promptly	5	2.94%	0.15	
			100.00%		
			SCORE =	5	

OUTBOUND ORDERS BY WAREHOUSE

Q1 2022 / Q1 2023

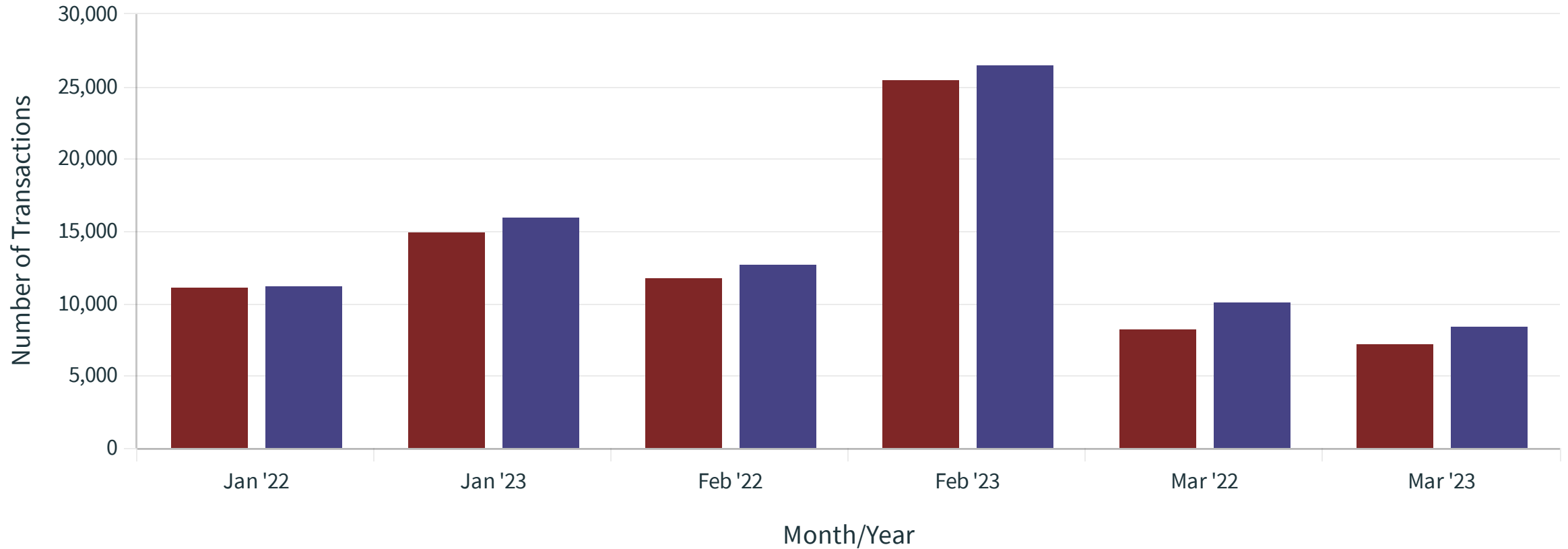
California New York



OUTBOUND ORDERS

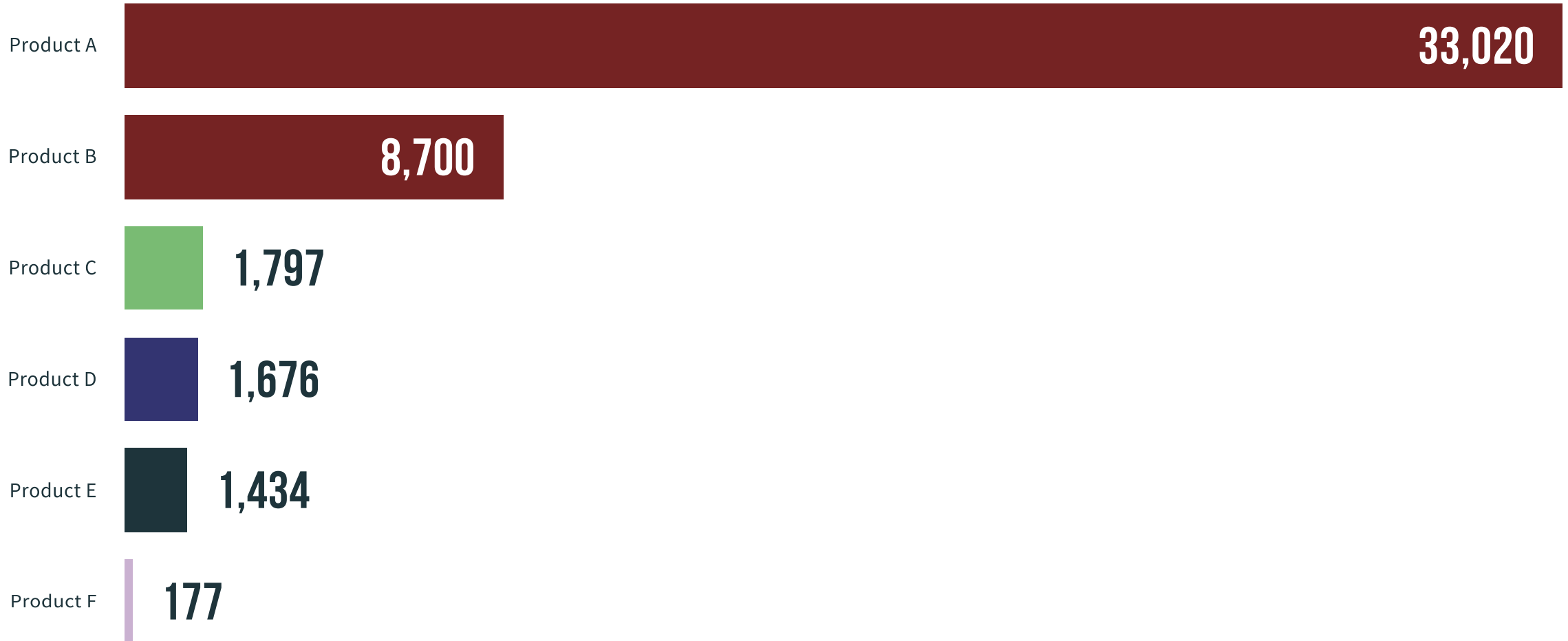
Q1 2022 / Q1 2023

● Orders Processed ● Items Shipped

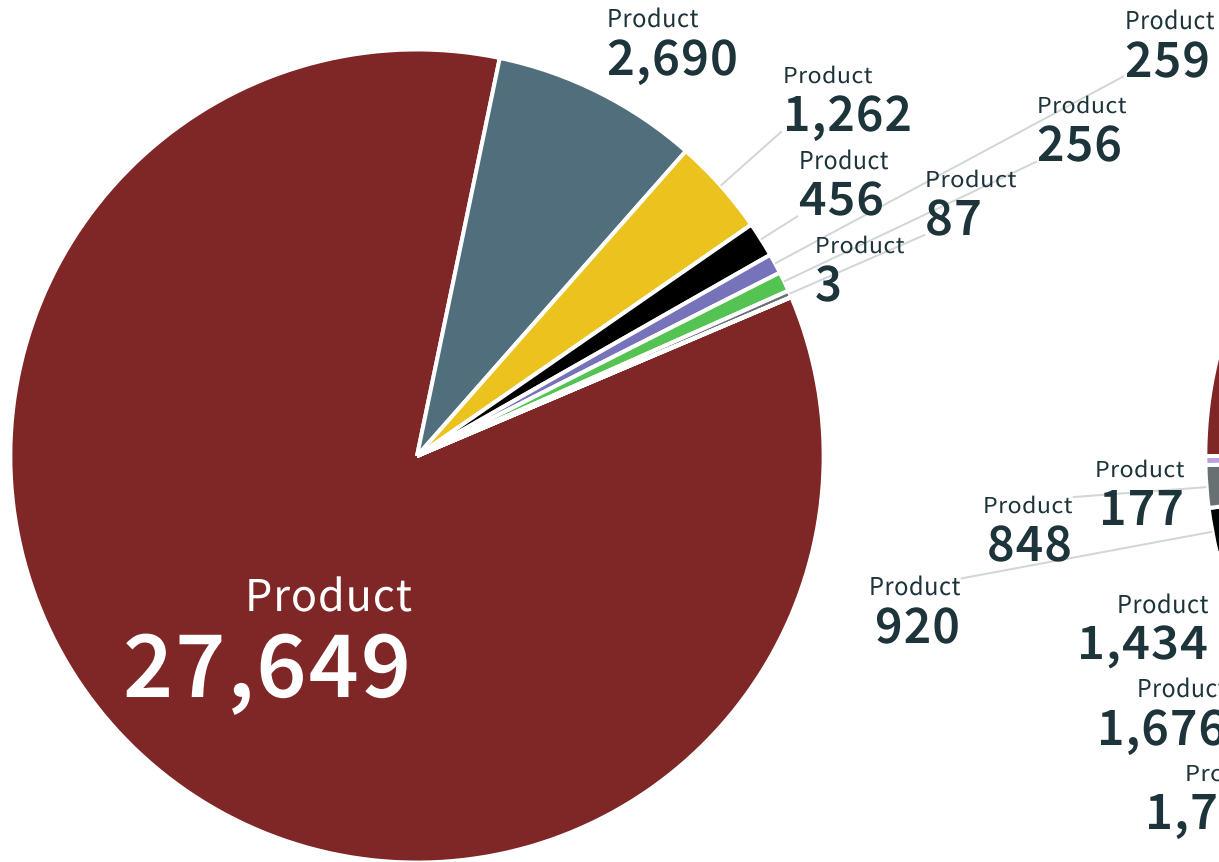


SHIPPED PRODUCTS Q1 2023

January - March

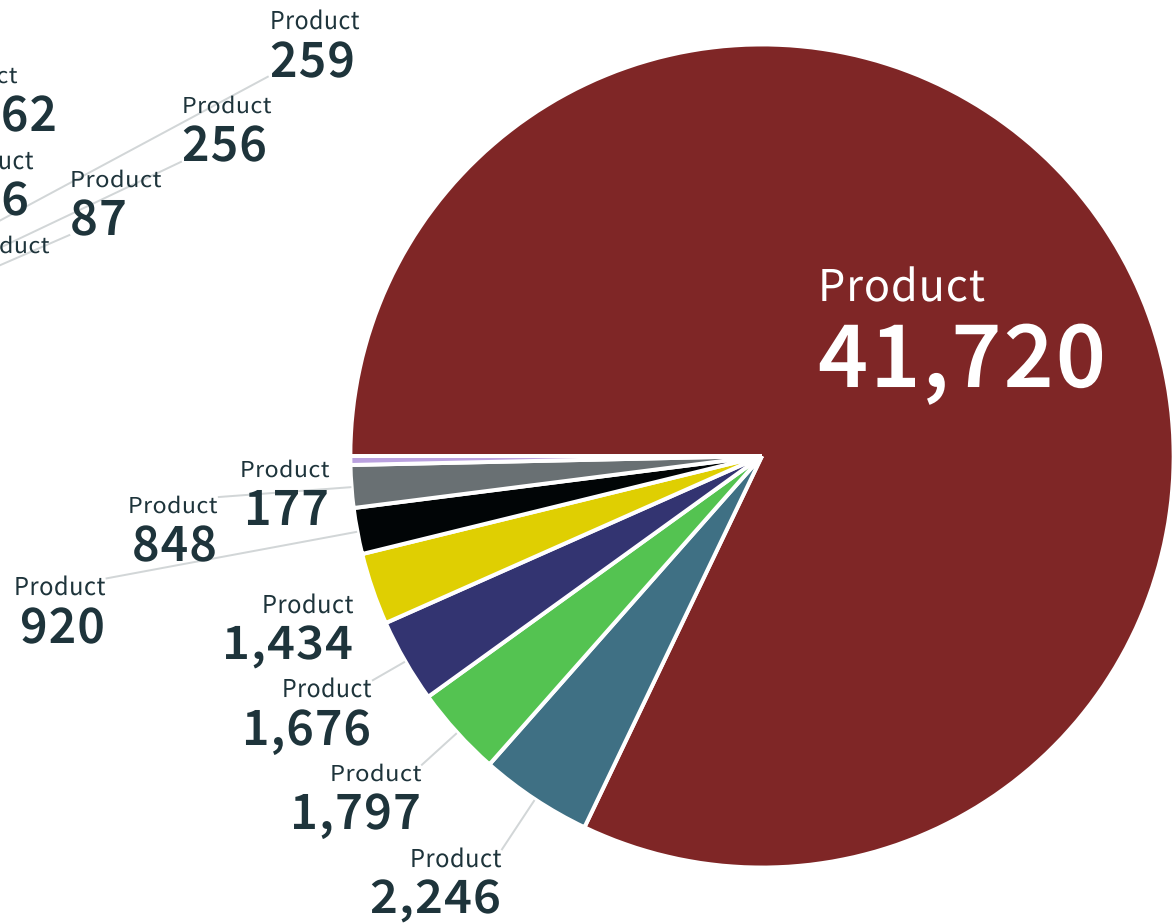


Shipped SKUs Q1 2022
January - March



31,400 Units Shipped

Shipped SKUs Q1 2023
January - March

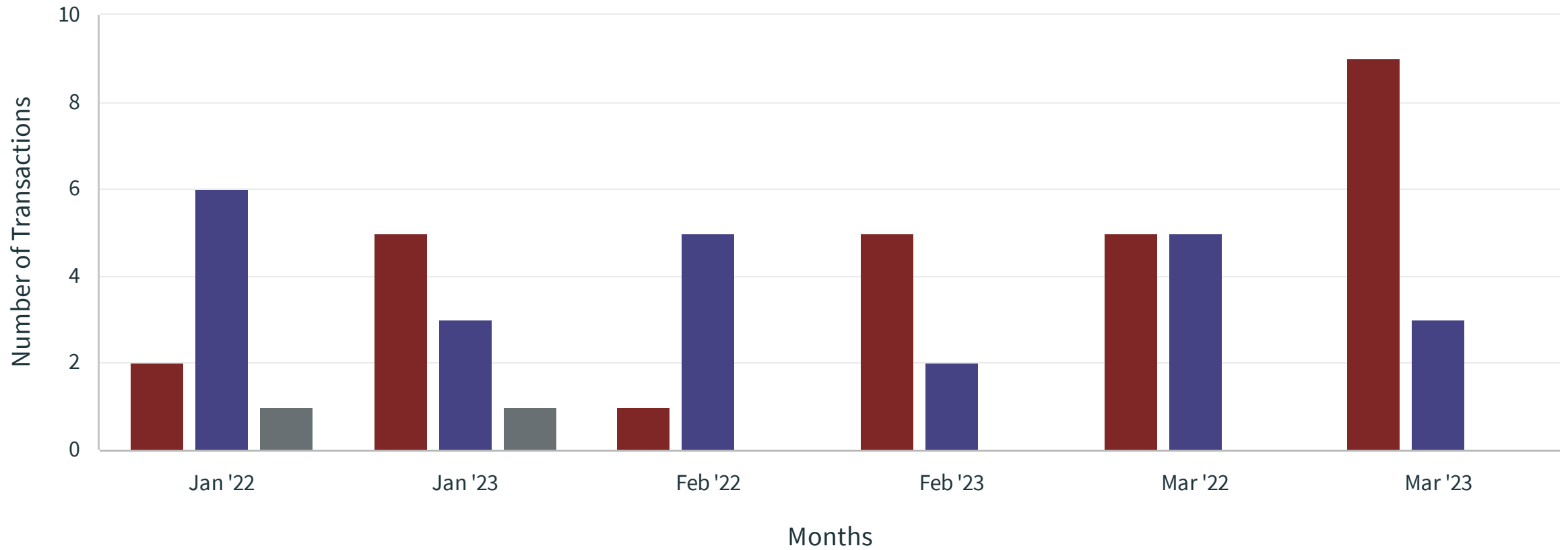


50,818 Units Shipped

INBOUND & INVENTORY ADJUSTMENT DATA

Q1 2022 & 2023

● Inbounds ● VAS ● Adjustments

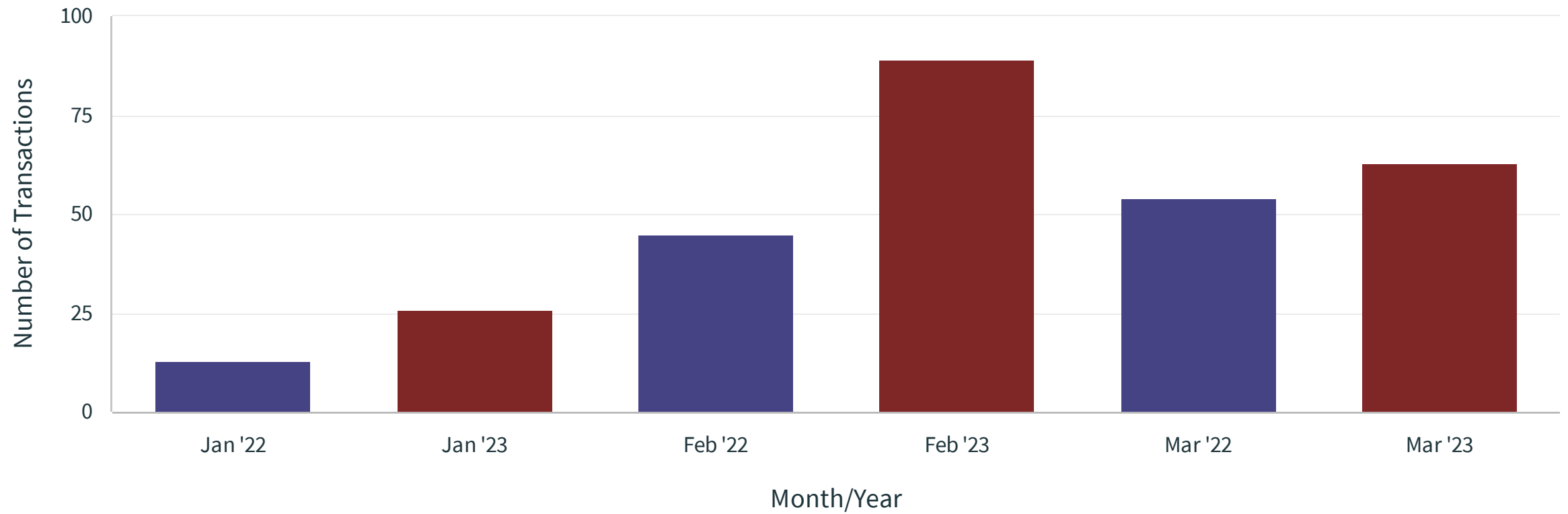


RETURNS

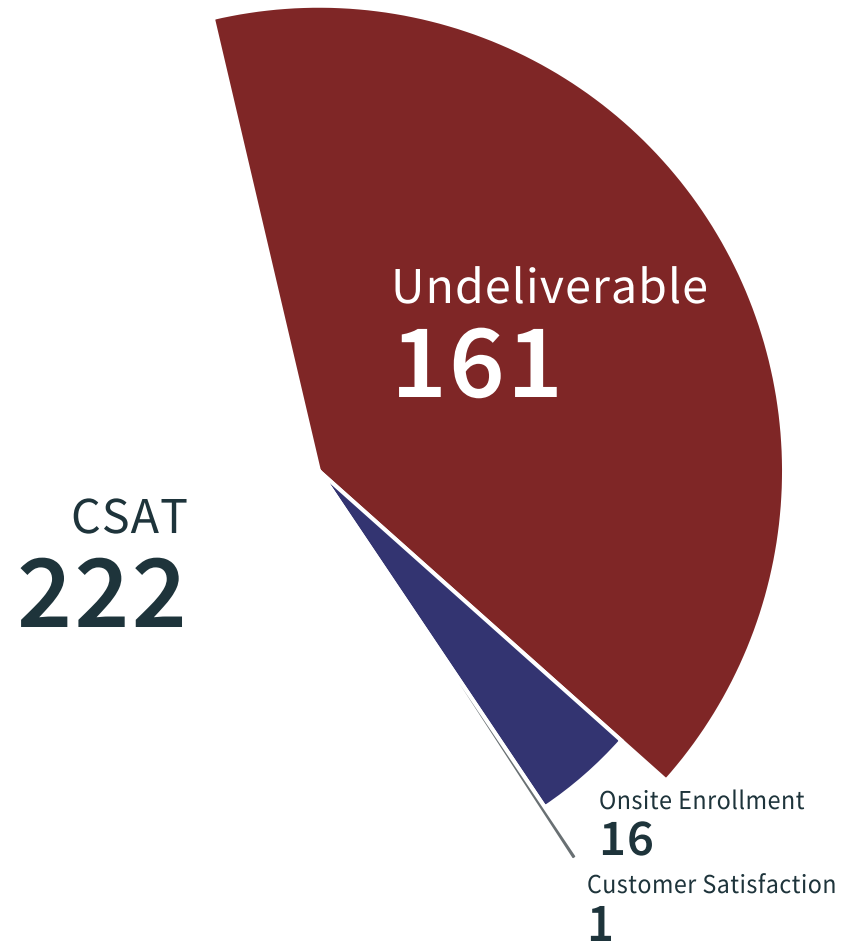
Total Returns

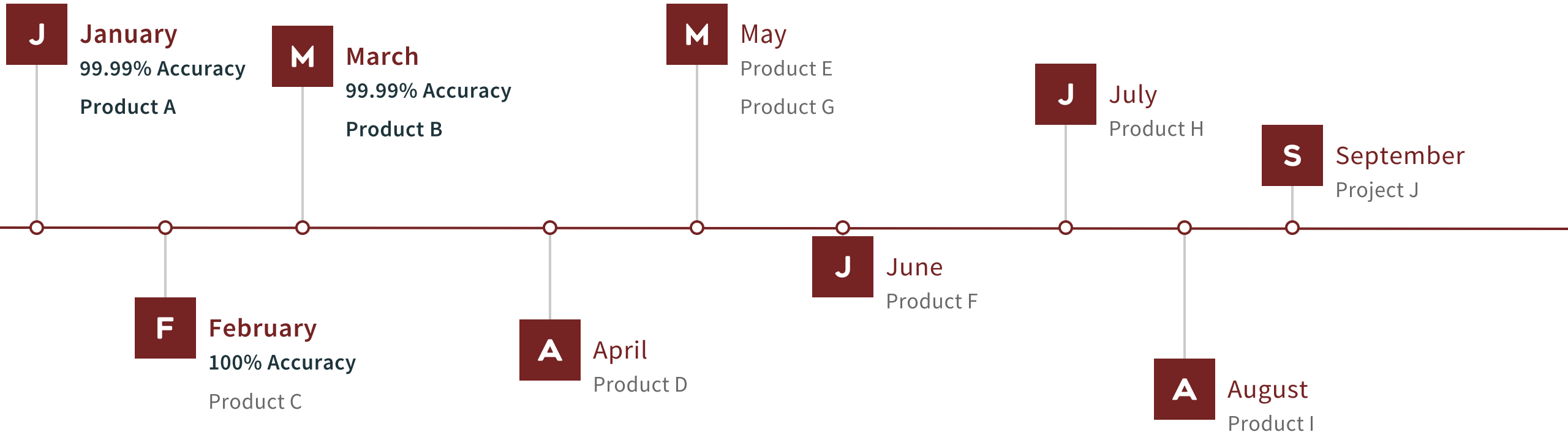
Q1 2022 = 112

Q1 2023 = 178



Q1 2023 Return Reasons





Cycle Count Schedule 2023

WAREHOUSE DATA

ERRORS / AREAS FOR IMPROVEMENT



47,808

ORDERS SHIPPED DURING Q1 2023

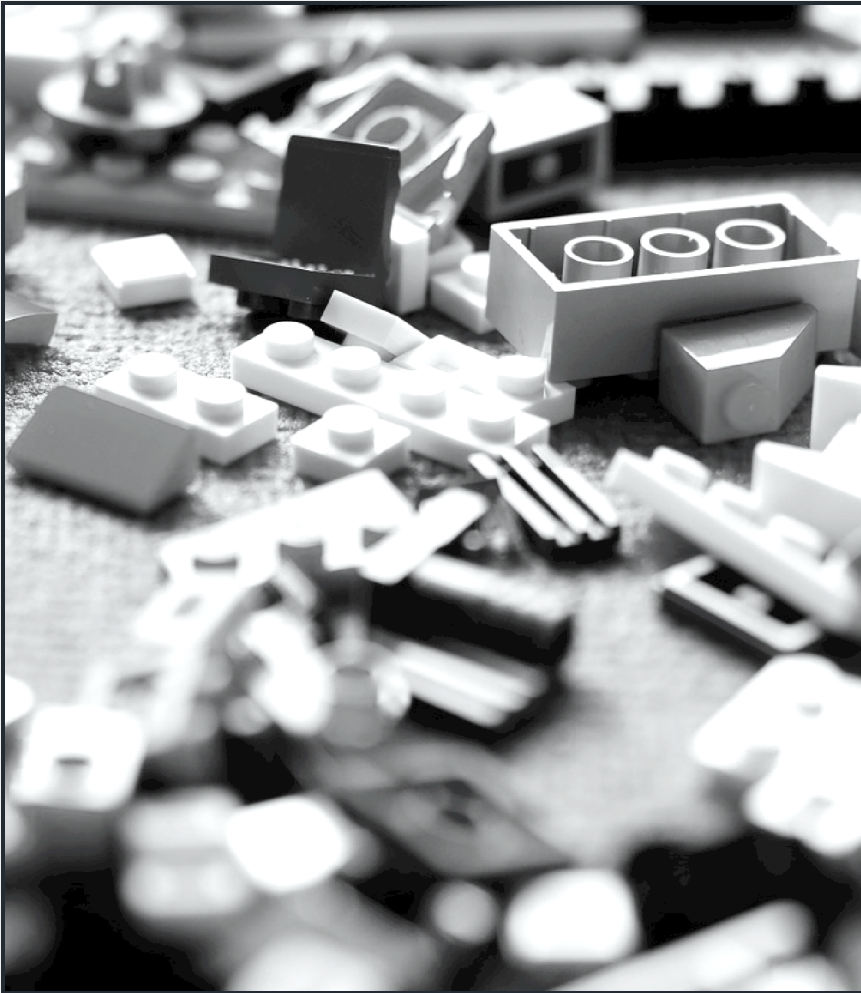


99.99%

SUCCESS RATE

1/26/23 #210511 - Wrong item shipped

VALUE ADDED SERVICES



9 Projects Submitted

9 Projects Completed

Average days to complete: 1.4 business days

15,278 units touched

Status of Orders for Last 30 Days

Summary

6,012	0.8 days	0.0 days	0.0%
Total Orders	Mean to Ship	Mean to Ship (BD)	Exception Rate

Orders by Status

1	161	5,838	0	0	1	0	0	11	0
New	Processed	Shipped (NP)	Shipped (P)	Shipped (C)	Exception	On Hold	Backordered	Canceled	Other

Breakdown of Exceptions

0	0	0	1	0	0	0	0	0
Discrepancy (Serial)	Overdue (Processing)	Overdue (Service Orders)	Overdue (To Ship - US-CA)	Overdue (To Ship - US-NY)	Overdue (To Ship - CA)	Overdue (To Ship - UK)	Overdue (To Ship - NL)	Overdue (To Ship - AU)
0	0							
Overdue (To Ship - HK)	Overdue (To Ship - Other)							

Last Order Update: 11 minutes ago (Tuesday, Apr 11th 2023, 10:31:59 am)

ACCOUNT MANAGEMENT COMMUNICATION METRICS

Workload

Active conversations

713 ↑ 37%

New conversations

709 ↑ 38%

Resolved conversations

686 ↑ 32%

Performance

Avg. First Response Time

4h 6m ↓ 30%

✉ 177

Avg. Response Time

5h 24m ↓ 47%

✉ 181 💬 390

Avg. Resolution Time

1h 56m ↓ 61%

✉ 686

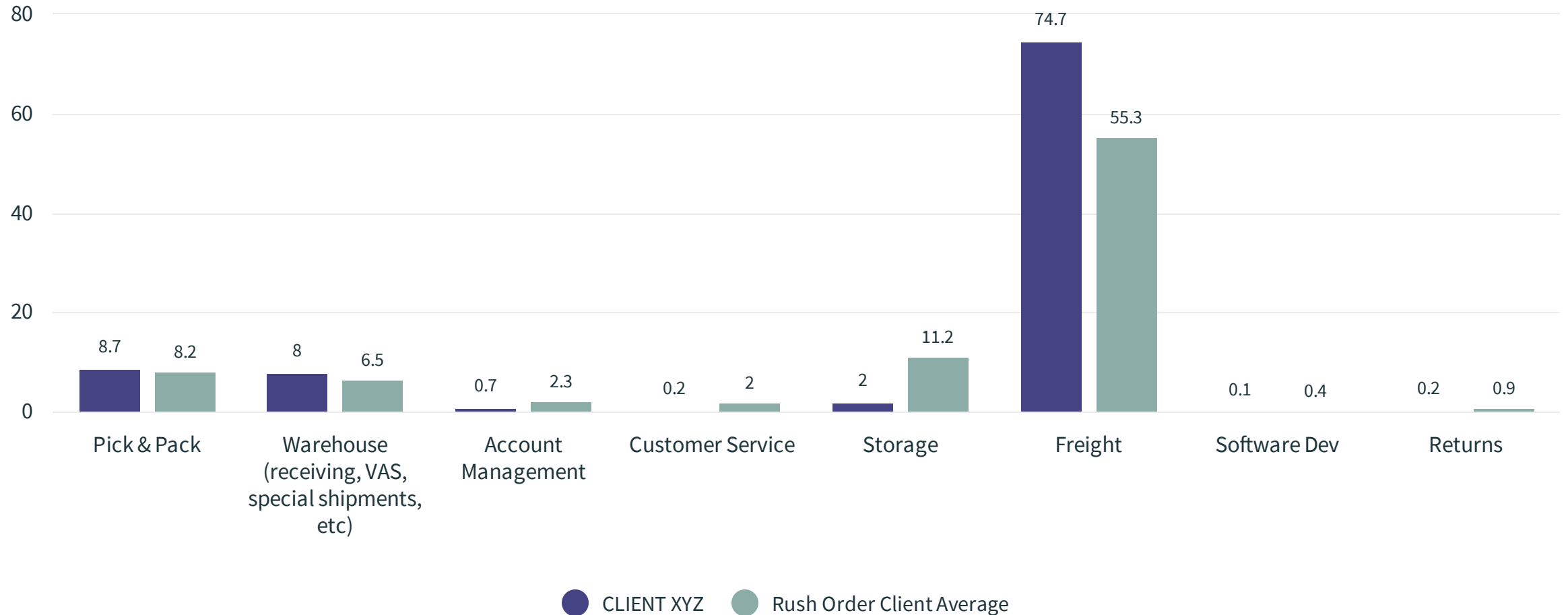
An aerial photograph of a two-lane asphalt road with a yellow center line, curving through a dense forest. The trees are in autumn, with some showing bright orange and yellow leaves, while others are dark green. The lighting is soft, suggesting late afternoon or early morning. The road leads the eye from the bottom center towards the top center of the frame.

SECTION 4

EXPENSE MANAGEMENT

Q1 SPEND BY CATEGORY

% of Total Rush Order Invoice

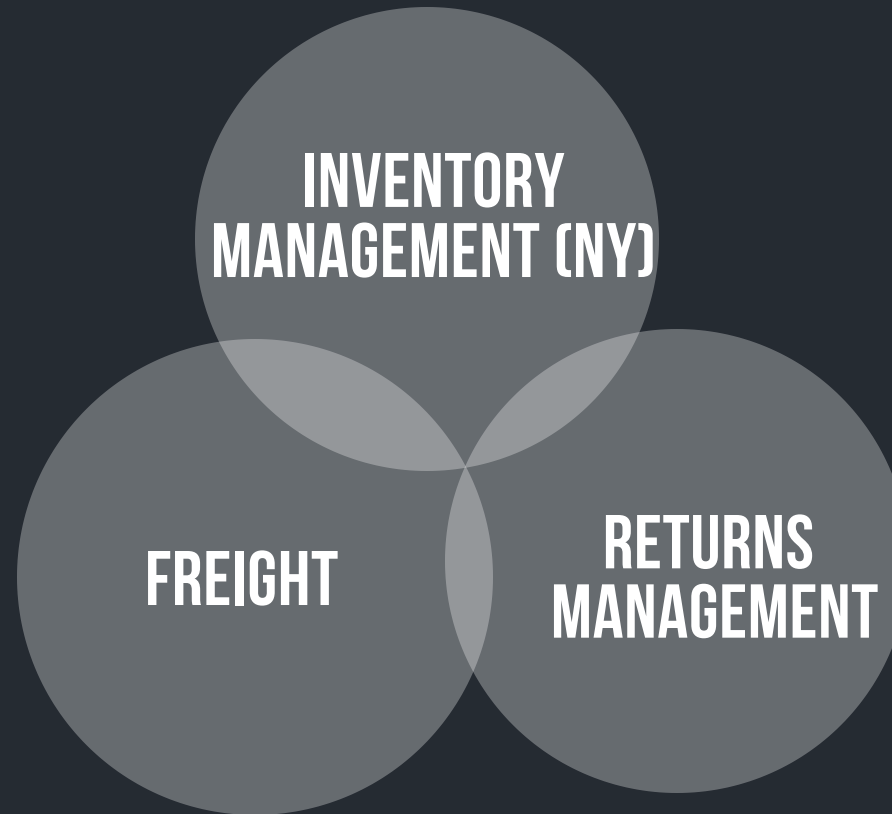


COST REDUCTIONS WE'VE TRIED & OPTIONS REMAINING



- ✘ Carrier ABC was cheaper than FedEx, but transit times and tracking visibility were not up to desired quality standards
- ✔ We're ready to present a variety of new shipping options today
- ✔ The latest round of FedEx negotiations is complete, resulting in even more savings than previously presented
- ✔ If we have to use UPS for any specific customers, we will need to go back to UPS to re-negotiate

COST SAVINGS & OPPORTUNITIES



An aerial photograph of a winding asphalt road through a dense forest. The road curves through a landscape with a rocky stream bed and patches of snow or light-colored ground. The trees are mostly green, with some yellowing foliage visible on the right side.

SECTION 4

PLANNING

CLIENT XYZ'S NEW BUSINESS DEVELOPMENT

1 Updates on sales?

2 New Products? Other Initiatives?

3 Partnerships?

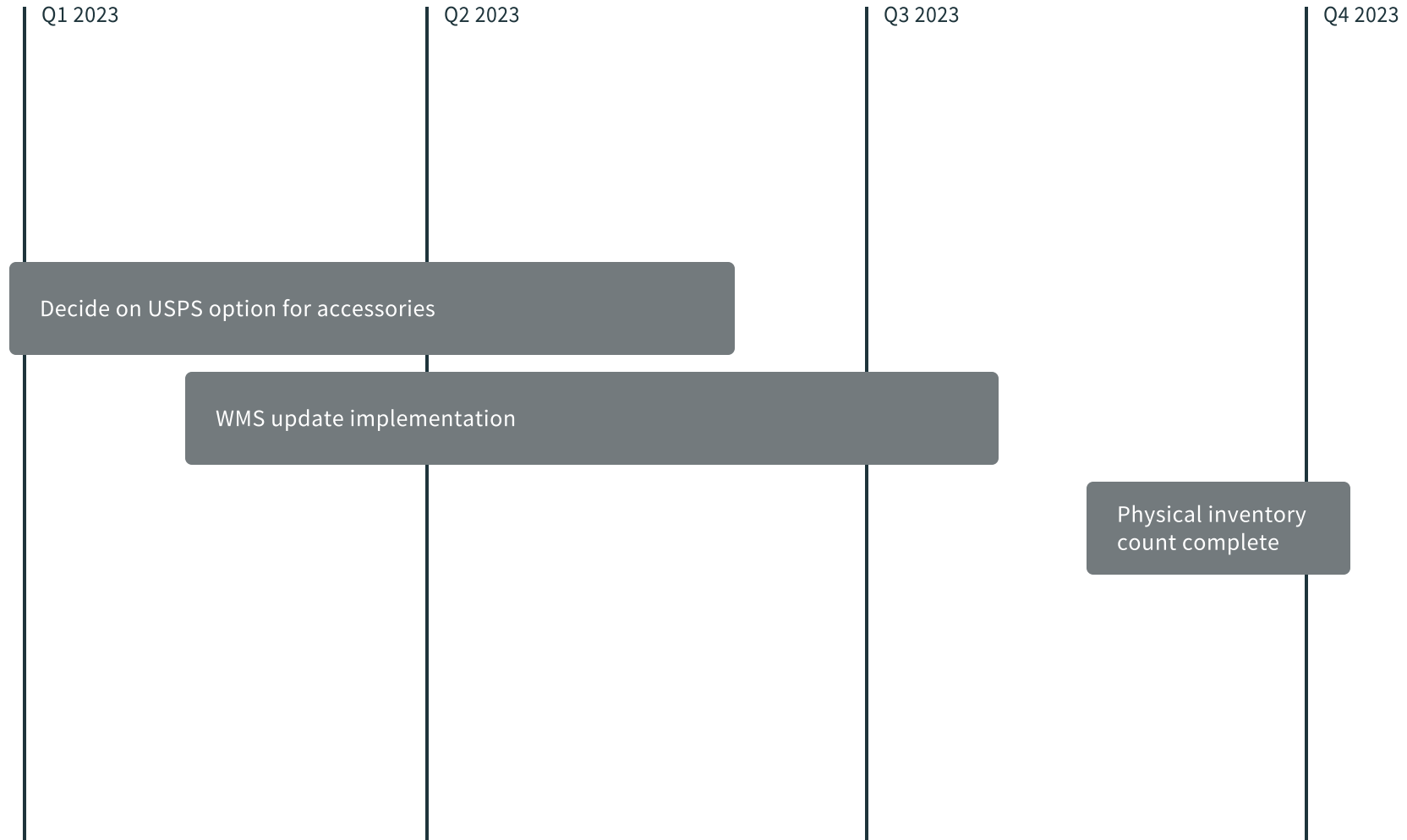
4 Geographic Expansion?

ACHIEVING SUCCESS

What challenges are you facing in pursuit of these goals?

What initiatives should we begin planning for?

ROAD MAP



FEEDBACK & NEXT STEPS

Thank you for your time and effort for preparing and participating.

We appreciate your trust and partnership.

Our goal is to continue delivering and increasing the value received from your Rush Order resources. Candid feedback and collaboration is appreciated ongoing.

Timing for next QBR meeting?

A photograph of a rustic wooden wall made of vertical planks. In the foreground, two horizontal wooden planks are attached to the wall, with the words "THANK YOU." painted in large, bold, teal-colored letters across them. The background wall is made of weathered, greyish-brown wooden planks. The bottom edge of the image shows some green grass.