Value Proposition

WHY CITRIN COOPERMAN?

- Holistic approach to improving your business – providing new perspectives on long- and short-term strategies

- Comprehensive professional services firm with practices designed to serve every one of your business needs

- Experienced professionals driven by focused industry verticals

- Finding innovative solutions drives our professionals and helps you succeed

HOLISTIC

COMPREHENSIVE

EXPERIENCED

INNOVATIVE
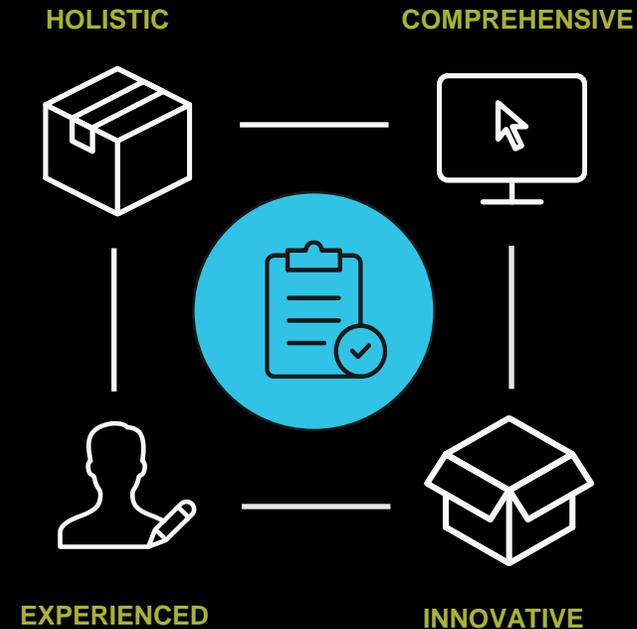
Value Proposition

WHY DIGITAL SERVICES?

- Full-service approach to your digital landscape

- Experience applied across multiple platforms, industries, and geographies, to build out the roadmap that fits your needs

- Resources across multiple disciplines coordinated to optimize outputs from multiple perspectives

- Professional project management

- Digital Service Works

- Tools built for all stages of digital transformation

- Targeted vertical focus produces a deeper understanding of the nuances of your industry

Value Proposition

WHY THE MODERN WORK TEAM?

- 20+ Years of experience in Microsoft space

- Completed effective projects across diverse set of clients

- Industry leading knowledge and execution of complex projects

- Built tools to dramatically improve employee efficiency

- Proven experience designing, implementing, and support Microsoft cloud-based collaboration solutions across M365 Apps, email, Teams, SharePoint, Viva and more

- As your trusted Microsoft advisor, we look across your digital estate to ensure that our efforts tie in your IT strategy and provide guidance on modernizing your IT solutions

DIGITAL SERVICES

Frontline Worker Assessment

Frontline Workers

WHO ARE THEY?

- Definition: Workers that deal directly with users of our products, customers, prospects, and the products themselves.

- **Wholesale Distribution** = Inside / outside salespeople, purchasing, receiving, material movers (order pickers, forklift operators, etc.), shipping schedulers (inbound and outbound), shipping clerks, delivery drivers, customer service

Who needs this?

COMPANIES THAT CAN BENEFIT FROM THIS OFFER INCLUDE:

- Growing business with specific roles emerging

- Established business enhancing user experience

- Recent Microsoft 365 adopters moving to phase 2 objectives

- Organizations that include dissimilar roles (office and administrative, warehouse, retail, delivery drivers)

80% of Employees are Frontline Workers[1] and Engaging Them is Vital to Success

2.9x In frontline-heavy organizations, profit per employee was 2.9x higher when the workforce was highly engaged compared to workforces with low levels of engagement.[2]

12x Highly engaged employees are 12x less likely to leave their company than those who are not engaged.[3]

Challenges Stand in the way of Engaging and Retaining Frontline Workers

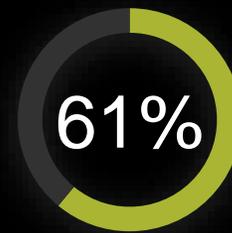**62%** of the frontline says leadership does not prioritize workplace culture[1]

67% of people wish they spent more time on professional learning[2]

51% of frontline workers don't feel valued as employees[1]

32% of frontline workers feel their voice is not being heard[1]

61% of employees would be more engaged if learning was integrated with work platforms[2]

60% wish more was being done to help physical exhaustion or mental health[1]

DIGITAL SERVICES

Empowering Frontline Workers and Improving Business Outcomes

Significant ROI	Better collaboration	Happier customers	More efficient use of time	Mistakes minimized
345% ROI* when deploying Microsoft Teams for frontline workers[1]	$14.3 million saved* when frontline workers communicate and collaborate through Teams[2]	$2.7 million in additional revenue* based on improved customer experiences[1]	$9.1 million worth of working time returned* to time-strapped frontline managers[1]	$6.1 million gained* from reduced errors and improved frontline outcomes[1]

*measured over 3 years

Sources: 1. Results are for a composite organization based on interviewed customers. "The Total Economic Impact™ Of Microsoft Teams For Frontline Workers, a commissioned study conducted by Forrester Consulting, July 2022" 2. Results are for a composite organization based on interviewed customers. "The Total Economic Impact™ Of Microsoft Teams, a commissioned study conducted by Forrester Consulting, April 2023"

Forrester Total Economic Impact Microsoft Commissioned Studies Conducted by Forrester Consulting

Microsoft Teams enables the composite organization to save time and money while empowering its employees to build deeper connections to colleagues, partners, and customers[3]

291%
Return on investment[1].

<6 months
Payback after go-live[1].

$33.9M Benefits Present Value
efficiencies from communicating and collaborating within Teams[1].

$8M three-year benefit due to improved and integrated communication with Teams Phone for enterprise customers[2].

> People wanted just one unified place to do all their collaboration, and that's where Microsoft Teams really stepped in.[1]
>
> Senior consultant, digital workspace solutions group, technology

> We're more efficient now because we standardized on Teams for internal communication collaboration.[2]
>
> CIO, financial services

1. The Total Economic Impact™ Of Microsoft Teams, 2023

2. The Total Economic Impact™ Of Microsoft Teams Phone, 2022

3. Composite organization results over a 3 year period

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Wholesale Distribution Target Client

WHO NEEDS THIS?

SCENARIO

- Moving to formal warehouse processes with approval workflows
- Growing past the start-up phase, pursuing modern systems
- Pursuing advanced WMS functionality like wave and batch picking
- Throughput is large enough to add specific roles such as receiving clerk, forklift drivers, shipping managers, etc. beyond generalists

TARGET OBJECTIVES

- Enhance the user experience to drive employee satisfaction, increase output / FTE, and improve accuracy
- Collect real-time data from the frontline

EXAMPLES

- Manufacturers
- Wholesalers
- Merchant wholesalers
- $25M - $100M Revenue

A Journey to Cultivating Employee Engagement

Frontline worker Joe wants to connect with his colleagues and company leadership.

He and his coworkers join an internal community to chat, find answers and share best practices.

In an open forum, he expresses feedback to his managers and has a direct line to company news.

He participates in live town halls or if he's unable to attend, he can easily access a recording when it's convenient for him.

Joe feels a greater sense of belonging and connection with his coworkers and company leadership.

Key Problems / Challenges
WHY NOW?

CURRENT SYSTEM DOESN'T FIT

- "My current system isn't built for my (frontline worker titles) it is more of a (type of system like accounting) system."

I NEED REAL-TIME DATA

- "Key updates are not shared fast enough to protect key business processes especially those that directly impact the customer."

EFFICIENCY

- "My team has to enter the same data multiple times into different systems."

- "Repetitive/mundane /Low-Value activities are taking up too much of my team's time."

STAFF

- "I can't seem to find enough people to fill open positions."

- "It takes way too long to onboard new team members."

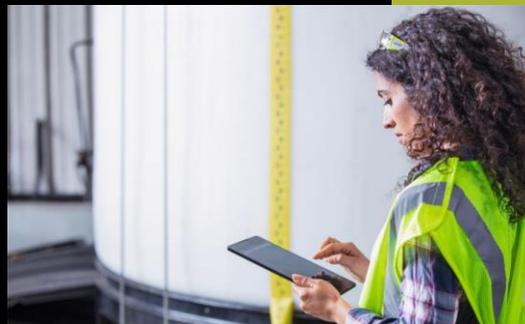# Challenges to Accelerating Onboarding and Upskilling

Lack of interactivity reduces effectiveness of frontline worker training

55% of frontline workers say they've had to learn new tech on the fly, with no formal training or practice[1]

Siloed legacy tools diminish manager insights into training effectiveness

Complex onboarding and training limit frontline access to needed information

Source: 1. Microsoft Work Trend Index, January 2022

Wholesale Distribution Specific Challenges

COMMUNICATION

- "I didn't know we had to receive so many containers. I could have increased staff."

- "Purchasing and the order pickers are constantly in the receiving area looking for products."

- "The sales team is always complaining that they didn't know about delays and the customer blind-sided them."

WAREHOUSE OPERATIONS

- "Cycle counting is so clunky that we don't even do it. It could save us a bunch of headaches if it were just easier."

- "The shipping team is getting burned out. Manually entering tracking numbers takes too long and fixing entry errors takes too much time."

# A Journey to Supporting Inclusion and Belonging

Corporate leader Jane wants her frontline managers and workers to easily express ideas and interests with their teams.

Her managers and workers share accomplishments and recognize each other for a job well done.

They use multi-language support, closed captions and other accessibility features to work in the way that works best for them.
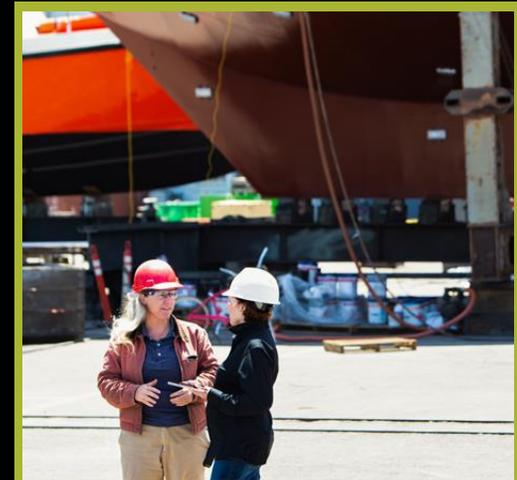
Jane and other leaders more easily spot and address issues, while making workers feel more included in the organization.

Ultimate Goals

WHAT IS MOST IMPORTANT?

FRONTLINE WORKER EXPERIENCE

- Unite the frontline worker with the rest of the organization

- Provide access to a highly mobile, fragmented workforce from anywhere without slowing them down

- Elevate adoption of new technology

- Speed up onboarding

COMPANY-WIDE BENEFITS

- Unite the frontline worker with the rest of the organization
- Provide access to a highly mobile, fragmented workforce from anywhere without slowing them down
- Streamline administrative duties related to identity and access management
- Identify when to apply low-code apps and other automation

Why Invest in the Frontline Worker?

LEADERSHIP: WHAT'S IN IT FOR ME (WIIFM)?

- Technology becomes a competitive advantage that reduces the pressure to add staff.

- Employee retention increases with improved job satisfaction, lower stress, and every level feeling they are an important part of the organization.[1]

- Automating manual tasks to increase the efficiency quotient within an organization driving productivity across the workforce

- Risk of cyber attack does not increase as technology is spread further into the organization and becomes more mobile, regardless of access.

- Happier customers and employees produced by improvements fueled by better and faster feedback from the best source — the frontline worker.

- Streamlined onboarding/offboarding process to easily manage higher frontline worker turnover.

- Continued innovation driven by low-code apps, automations, and more.

Why Invest in the Frontline Worker?

MANAGEMENT: WHAT'S IN IT FOR ME (WIIFM)?

- It will be easier for my team to reach our goals with more efficient tools and clearer communication across roles.

- I won't have to worry about recruiting so much because my employee retention increases with higher job satisfaction, lower stress, and every level feeling they are an important part of the organization.1

- Quick feedback from the frontline workers, many that are mobile, allows us to react faster to unexpected circumstances (inventory variance, higher consumption than expected, service ticket going to take longer than expected, etc.).

- Intuitive technology streamlines the onboarding process.

- The offboarding process protects my proprietary data.

- Feedback from the frontline workers drives continued innovation leveraging low-code apps and automation.

Why Invest in the Frontline Worker?

FRONTLINE WORKER: WHAT'S IN IT FOR ME (WIIFM)?

- 46% Technology could reduce workplace stress[1]

- 55% Have had to learn new technology on the fly[1]

- Easier to get my job done with better tools.

- Better understanding of business goals at the organization level creating a higher sense of pride when individual goals are met.

- Automated training makes learning new tasks quick and easy. I fit right in the first time I execute the new task.

1. *MS Business Case – Frontline Worker*

Types of Projects

WHAT ARE SOME PROJECTS THAT ENHANCE THE FRONTLINE WORKER EXPERIENCE?

- Onboarding/offboarding process

- Timesheet entry

- Asset management

- Inventory tracking

- Production output tracking

- Service requests

- Service order execution

- Vacation and time-off tracking

- Policy and procedure signoff and tracking

- Org-wide communication of important information

Frontline Worker Assessment Tiers

Tier 1

$1,100*

- ✓ Discovery = 1 hour
- ✓ Current Process Review
- ✓ Expert Analysis
- ✓ Deliverable
  - • Executive Summary

Tier 2

$2,200*

- ✓ Discovery = **2** hour
- ✓ Current Process Review
- ✓ Expert Analysis
- ✓ Deliverable
  - • Executive Summary
  - • **Recommendations Document**

Tier 3

$3,300*

- ✓ Same as Tier 2
- ✓ Includes 1 additional process
- ✓ Subsequent process @ **$1,100 / each**

Starting price. Pricing may vary based on complexity. Discovery will provide the details to price each process accurately.

Questions?

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Thank You

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