

The hardest part about embarking on the quest to use our LM2 (*Lean Material Management*) reports is getting started, here is what we need:

1. **We need to know a little bit about your locations** (*one time information*)
 - a. Location name (*obviously we need full contact information*)
 - b. Sales Tax rate
 - c. Spray Booth Count
 - d. Certified? (*I-CAR, ASE, OEM*) Yes or No?
 - e. Who you want the reports emailed to each month (*email addresses*)
2. **We need to get detailed purchase reports from your jobber each month.**
(*Please share this email as desired with your jobber and staff*)
 - a. **You need to initiate this with your jobber, as their customer this initial request needs to come from you.**
 - b. Depending on the jobbers system, this could be a purchase report, item usage etc.
(*We work with dozens of jobbers and several systems*)
 - c. Must be in MS-Excel, CSV, delimited or other tabular format.
 - d. Jobber contact is appreciated for questions we may have.
 - e. The report should include Part#, Description; Qty. Purchased, Invoiced Sales amount, and UOM
 - f. Many of our clients ask their jobber to send these reports each month to themselves and CC us.
(*Making this another one time task*)
3. **We need your sales inputs (4) each month**
 - a. Sales Gross (*w/o sales tax*)
 - b. P&M Sales dollars
 - c. R.O. Count
 - d. Refinish Hours
 - e. Submit your #s Quick Data Entry
<http://www.leanmaterialmanagement.com/Calcs/Data1/CustDataForm1.htm>
 - f. We have alternative methods as well especially for MSOs or for more advanced reporting.
4. **We provide** (*Not required*) **a mutual non-disclosure agreement (NDA) to all our clients. We want all parties' jobber and shop to know their information is safe with us. We will not share you reports with any 3rd party unless you authorize in writing (*with or without NDA*). Summary data is shared with MSO & 20-Groups.**

We need your help to get these reports started. We ask you and your jobber to provide your sales & purchase inputs for the most recent 3 months. This will give you a good benchmark to start and compare with your peers.

We also encourage you to allow us to share these reports with your jobber, so that we can all work together to improve and maintain P&M margins and performance. (*Shared by default unless requested otherwise*)

We will review and fine tune our reports with you (*your staff, jobber, reps etc.*), as desired, we strongly encourage you to do this. **Without this final step your reports may NOT be in sync with your group.**

Please contact us if you have any questions.

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