

What's **eating** your margin?

If you're losing margin, this
will show you where to look.




Margin pressure isn't coming from one place. It shows up across pricing, purchasing, and everyday sales decisions, often in ways that are easy to miss.

This checklist helps you spot where it could be happening in your business.


If you can't check them off confidently, that's where your margin is **at risk**.



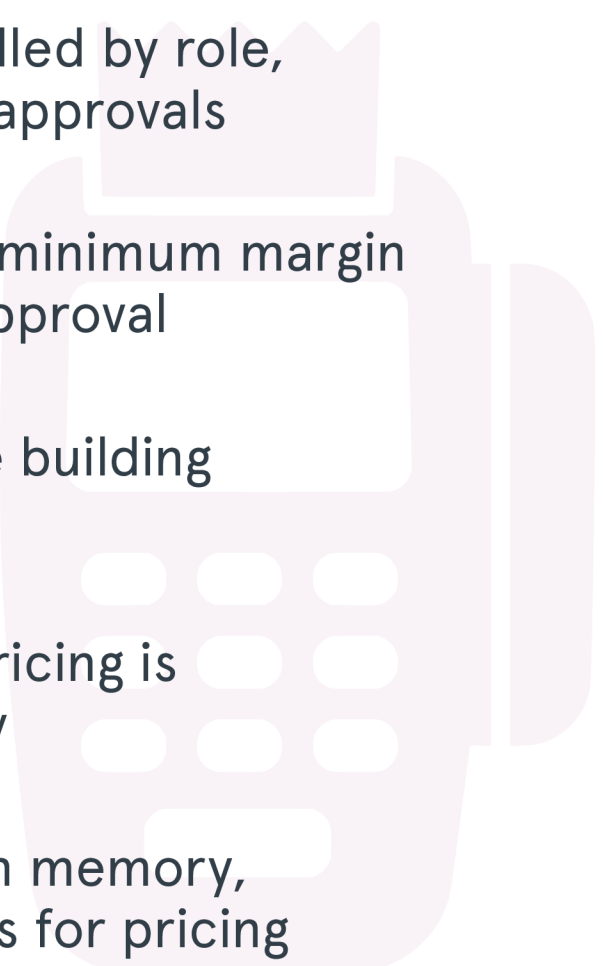
Sales behaviour & decisions

- Quotes are created quickly enough to stay competitive
 - Reps have full customer history and pricing context when selling
 - Pricing is consistent across reps, branches, and channels
 - Reps are guided toward higher-margin products or alternatives
 - Sales decisions are based on margin - not just closing the deal
- 

Pricing & cost control

- Pricing updates automatically when supplier costs change
 - Freight, duty, and landed costs are included in margin
 - You're not quoting from outdated costs or price lists
 - Promotions and special pricing are applied correctly
 - You can see true margin before the order is confirmed
 - Pricing can be adjusted by customer, product, or market conditions
- 

At the point of sale

- Discounts are controlled by role, with clear limits and approvals
 - Sales can't go below minimum margin without warning or approval
 - Margin is visible while building every quote or order
 - Customer-specific pricing is applied automatically
 - Reps aren't relying on memory, spreadsheets, or calls for pricing
 - Reps don't need to override pricing to get deals done
- 

Purchasing & rebates

- You can see true product cost, including rebates
 - Rebates are tracked in the same system - not separately
 - Buyers can compare suppliers and costs easily
 - Purchasing decisions consider margin, not just availability
 - Cost changes are reflected quickly across the business
 - You're not forced into higher-cost buying due to inventory issues or urgency
- 

Visibility & control

- You can see low-margin sales as they happen - not after
 - You have a clear audit trail of price or discount changes
 - You can identify margin by customer, product, and sales rep
 - Alerts flag unusual or low-margin transactions in real time
 - You're not relying on reports to find problems after the fact
- 

Across the business

- Sales, purchasing, inventory, finance, CRM, and rebates aren't split across separate systems
- You can see margin across the full lifecycle (quote → invoice)
- Everyone is working from the same data
- Field reps have mobile access to live pricing, inventory, and customer data
- Processes don't rely on workarounds or manual fixes
- Orders don't get delayed or reworked due to mistakes or missing information

You'll tick some of these. You won't tick them all. And the gaps? That's where your margin is going.

The good news is, you've just identified where to focus. Because once you can see it, you can start to fix it.

If your current ERP system - or multiple systems - is making that hard or impossible, it might be time to look at something built to handle it properly.

That's exactly what GenetiQ is designed to do - specifically for lumber and building materials suppliers.



GenetiQ