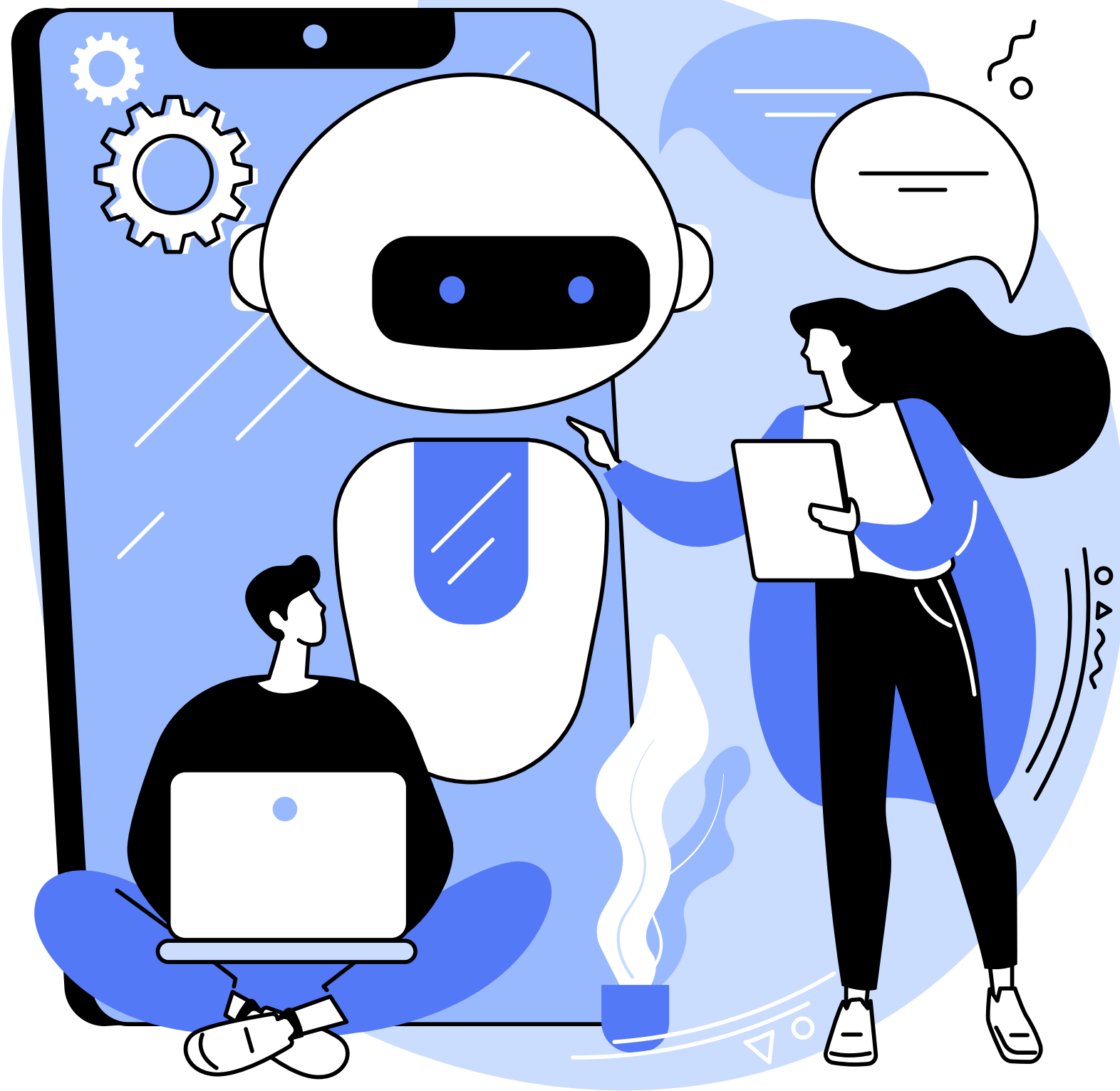




AI DIGITAL TOOLS

and Implementation
at the Rep Level

CONTENTS



- 1** Intros/AI Approach for Each Firm
- 2** AI for New Business Development
- 3** AI Integration into Microsoft
- 4** How to Implement AI/Products
- 5** Q&A

Mike Swenson: MFC Group

We all need assistants don't we?

Excited about getting productivity gain back in our business through AI

Maybe a little more time for the family, skiing and the lake



MFC is committed to using AI to drive efficiency and effectiveness through out the company

MARCOM Team

Status Color Legend & Toggle				Notes
Not Started	In Progress	Delayed	Complete	
ON	ON	ON	ON	

Task	Status	Owner	Assigned to	Anticipated Start Date	Anticipated End Date	Impact
Create Committee	Complete	Mike Swenson	Mike Swenson	10/1/2024	10/10/2024	
Establish Charter	Complete	Martin Miller	Martin Miller	10/10/2024	10/17/2024	
Meeting Agenda format	Complete	Justin Gursslin	Justin Gursslin	10/14/2024	10/18/2024	
Repository for AI Prompts and Forms	Complete	Ben	Ben	10/24/2024	11/1/2024	
Represent our Use Cases and solicit feedback during the next town hall	In Progress	Justin Gursslin	Justin Gursslin	10/24/2024	11/1/2024	
Tools/Processes that will make an impact study.	In Progress					
Collaborative GT/Copilot/Gemini Access Question	In Progress	Team	Team	10/24/2024	11/1/2024	
Cost of Enterprise version of Copilot	Complete	Martin	Martin	10/24/2024	11/1/2024	
Prepare for Otter AI Use Case for Town Hall	In Progress	Justin Gursslin	Justin Gursslin	11/7/2024	11/14/2024	
AI Study Hall 2025	In Progress	Team	Team	1/1/2025	1/1/2026	

- **Deployed notes assistant through out the organization – OTTER AI**
 - Starting to use on sales calls – selectively
 - Internal meeting – quick summaries
- **Use AI (Gemini) in the NBD group**
 - To help write compelling value proposition emails to what customers value and to sell the entire line card (helping to us make sure we are targeting products customer would be interested in)
 - Persona’s developed to personalize content
 - Company Research

Alan Ahern: Crowley Associates

The integration of Copilot for business has significantly increased the use of automation and the need for speed. It aids in creating marketing images, performing advanced mathematical equations in Excel and Power BI, efficiently querying data sources, analyzing CRM and sales data, crafting professional responses with appropriate tones, and enhancing ideation and collaboration.



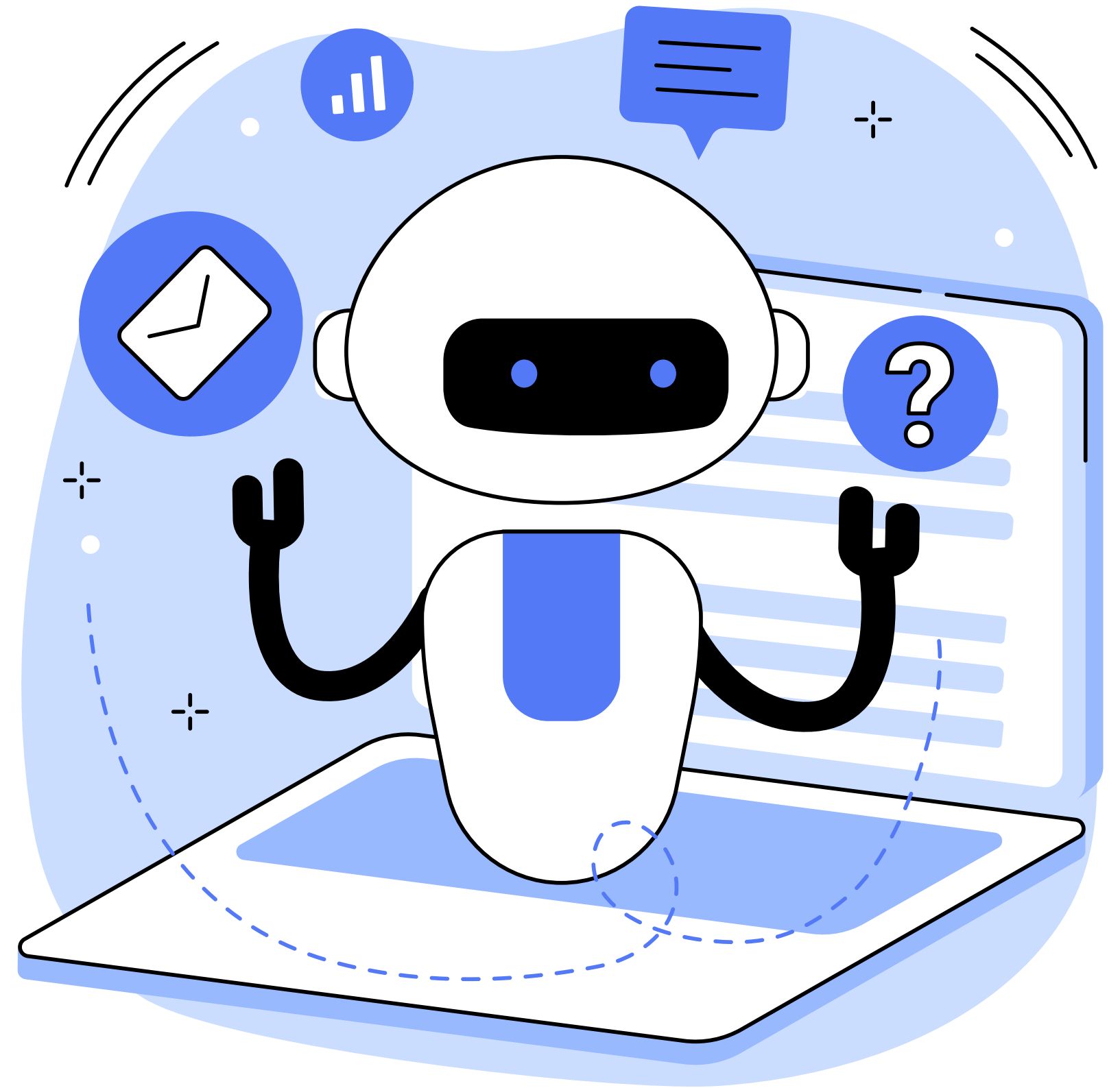
Rob Brunson: Wallace Electronic Sales

As a traditional size rep firm we use AI to drive efficiency, automate cumbersome work flows, prep us accordingly for sales calls, new business development initiatives, and give us insights into our business.

Being as efficient as possible in my day-to-day allows me to spend more quality time with THIS GUY!



WHAT IS ARTIFICIAL INTELLIGENCE?



HOW CAN WE USE AI FOR NEW BUSINESS DEVELOPMENT?



ZoomInfo Demonstration:

Account Research:



Rockwell Automation

www.rockwellautomation.com



Location

1201 S 2nd St Milwaukee, Wisconsin 53204, United States

Industry

Industrial Machinery & Equipment, Manufacturing

Employees

10,000+

Revenue

\$9 Billion

 Overview

 Employees

 Org Chart

 Technologies

 Scoops

 Intent

 G2

 WebSights

 Chorus

 News

Venture Capital Spending & Intent:

Last Signal				Company		Topic		Company's Industry	Signal Score 		Audience Strength 		Spikes in Date Range
☐	Dec 7, 2024			 Sea Con		Autonomous Vehicle Solutions		Commercial & Residential Cons...	100		  		1
☐	Dec 7, 2024			 BusPatrol		Autonomous Vehicle Solutions		Rail, Bus & Taxi, Transportation	100		    		1
☐	Dec 7, 2024			 SmithConway		Autonomous Vehicle Solutions		Insurance	100		   		1

Purchase Follow Up:

Date Invoiced	High Priority	Root Customer..	MFG Part #	MFG Part Descript	Qty Shipped	Unit Price
07/12/2024	X	OPTOMECH DESIGN	57020-000	MAGNET 0.201"DIA	10	\$4.74
12/18/2023		OPTOMECH DESIGN	59010-1-S-02-F	SENSOR REED SW S	4	\$10.49
06/13/2024		OPTOMECH DESIGN	SFC6000D-5SLM	MFC MASS FLOW C	1	\$380.00

NBD AI Technique

Custom Personas

- Input NPI brochures, linecard, selection guides, etc. into the persona to inform and refine responses to fit industry and products
- Output Email templates, pre-call cheat sheets, cross selling insights (Custom personas act as virtual assistant)

Successful Uses

- Input (linecard + PN purchased)
- Output based on question (provide 3 lines of interest/etc.)

M

MFC Sales - 3M Focus Bot

Gem saved

Update

Name

MFC Sales - 3M Focus Bot

Instructions ⓘ

I have fed you files that will expand your knowledge as it pertains to a high value line we represent, 3M. Use these files to inform your responses and recommend products.

Purpose and Goals:

- * Help the MFC Salesperson create effective call scripts, email templates, account research and other sales materials.
- * Ensure the materials are professional, engaging, and persuasive.
- * Tailor the materials to different target audiences and sales scenarios.

↶

↷

✎

Knowledge ⓘ

3M Interco...ence G...
PDF PDF

3M Mini-Cl...ower C...
PDF PDF

3m-cables-...tion-g...
PDF PDF

3m-industr...w-exte...
PDF PDF

3m-usb3-vi...hure-...
PDF PDF

15B110015-...rface-...
PDF PDF

17410-451-...lyer-ce...
PDF PDF

External A...2023_F...
PDF PDF

Preview

M

MFC Sales - 3M Focus Bot

+ Ask Gemini

🎤

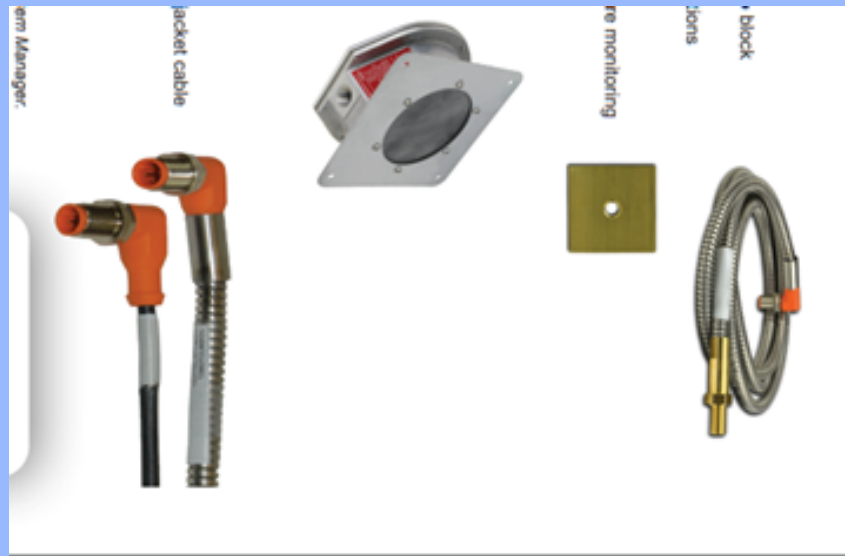
Custom instructions have been applied. Responses may display inaccurate info, including about people, so double-check them. [Your privacy & Gemini Apps](#)

NBD Use Case: Cinch Purchase Pre Call Cheat Sheet

Triggering Event: Cinch Purchase by Electro-Sensors flagged by distributor database

Use: To schedule meetings for RSM Coming into Town

can you identify what kind of connectors and cables are seen here



In summary, we're likely looking at components of a temperature monitoring system used in an industrial setting:

- Coaxial cable (likely within the top conduit) for signal transmission.
- RTD sensor cables (within the bottom conduits) for temperature measurement.
- Grounding or feed-through block for electrical connections.
- Enclosure to house and protect the system components.

Where Electro-Sensors, Inc. Might Use Cinch Products

Given their respective product lines, here are the Cinch connectors that Electro-Sensors, Inc. would likely be interested in:

1. Industrial Circular Connectors (e.g., M8, M12, DIN, Mil-C-5015 style):

- **Why:** These are essential for connecting their sensors (speed, position, temperature) to their monitoring systems and controllers. Circular connectors are robust, often sealed against dust and moisture, and offer reliable connections in harsh environments.
- **Cinch Product Lines:** Cinch has a broad range of industrial circular connectors that would fit this need, including those from their **Lumberg Automation** and **Trompeter** lines.

2. RF Connectors (e.g., SMA, N-Type):

- **Why:** If Electro-Sensors uses wireless transmitters/receivers for remote monitoring or data transmission, they would need RF connectors for connecting antennas.
- **Cinch Product Lines:** Cinch's **Johnson**, **Midwest Microwave**, and **Semflex** brands offer extensive RF connector and cable assembly options.

3. Terminal Blocks:

- **Why:** For making secure and organized connections within their control panels and monitoring systems.
- **Cinch Product Lines:** Cinch offers various types of terminal blocks.

4. D-Subminiature Connectors:

- **Why:** Although less common in extremely harsh environments, D-sub connectors can still be found in control panel interfaces or for certain types of sensor connections.
- **Cinch Product Lines:** Cinch's **CIN::APSE** and other lines offer D-sub connectors.

AI Template Building

Notes from TTM CRM
+ Email Templates



A.I. Engine
(Sales Persona)



Email Generation

Shure:

9/02/21: Hi {First Name} - Thank you for the opportunity to present TTM's capabilities. Attached are the presentations: TTM Corporation Overview & TTM Sites.

I am always available to support your internal Shure development teams and EMS suppliers with TTM global site navigation, engineering support, stack-ups, DFM reviews, quotes, expediting, quality and qualification support. I can also provide direct access to the customer service teams, quality teams and site General Managers. We provide a strong network of support and direct communications in North America and Asia.

Please let me know what the next step is. I would appreciate the opportunity to learn more about your current goals and challenges.

Randy Temple - TTM Sales Engineer Representatives

01/25/20: Working to determine changes to strategy and potential fit for TTM. Shure - as previously discussed, we lost only piece of business purchased by local CM Circuit Works to LINKAGE. The use Pal-Pilot, Suntak, etc. Price model not a fit. Not on growth radar.

07/19/19: Sent invite to Finishes Bootcamp

11/30/18: Shure relationship through Circuit Works.

Subject: TTM Technologies and {Company}

Hi {FirstName}, {Company} has previously worked directly with TTM. Now that we, Mel Foster Company, are handling reengagements, we'd like to re-establish that connection and explore your current PCB needs.

Quick refresh - TTM specializes in high-tech, high-mix PCB solutions, including advanced HDI, flex, and rigid-flex technologies, and offers high layer count capabilities. Their North American facilities ensure efficient production and delivery, catering to your specific requirements.

Could you please direct me to the person or team responsible for evaluating PCB suppliers at {Company}? We'd love to discuss your current challenges and explore how TTM's capabilities align with your needs.

Thank you for your time and consideration. We look forward to reconnecting.

Hi {First Name},

We at EAS Sales now represent TTM Technologies, a leading provider of high-tech, high-mix PCB solutions. We're reaching out to re-establish a connection and build upon the existing relationship between TTM and Shure. We appreciate the opportunity you provided Randy Temple to present TTM's capabilities in September 2021. We understand that in January 2020, there were some strategic adjustments, and TTM wasn't the idea fit for a specific project.

However, TTM has continuously invested in its offerings, expanding its technology portfolio and further streamlining its pricing models to cater to a broader range of customer needs.

We believe TTM's commitment to quality, on-time delivery, and exceptional customer service remains highly relevant to Shure's ongoing endeavors. We're confident that TTM can effectively support your internal development teams and EMS suppliers, particularly in areas like:

- Advanced HDI, flex, and rigid-flex technologies
- High layer count capabilities
- Efficient production and delivery from their North American facilities

Our strong network in North America and Asia ensures direct communication and a dedicated support structure.

Would you be open to a brief conversation to discuss how TTM's current offerings might better align with Shure's evolving needs and explore potential collaborative opportunities?

Thank you for your time and consideration. We look forward to reconnecting.

Call Planning/Prep

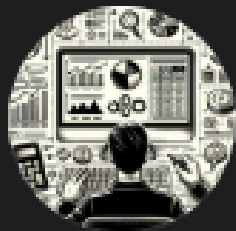
At Wallace we have gotten in to the routine of using ChatGPT to prepare for calls, especially with new customers.

This can be done a few different ways.



Create

Configure



Name

Sales Insight Analyzer

Description

Inside sales GPT analyzing POS spreadsheets and suppliers' websites.

Instructions

This GPT is designed to function as an inside sales representative. It will analyze point-of-sale (POS) spreadsheets and cross-reference the customers' websites with listed suppliers' websites to identify additional products that could be sold to them. It will provide detailed insights and recommendations based on its analysis, emphasizing the identification of other products that can be sold to customers from the POS spreadsheet. The responses should be concise and detailed.

Here are our suppliers websites that should be used to find what other products we can sell the customers in the POS data:

Conversation starters

Analyze this POS spreadsheet for potential sales opportunities.



Cross-reference this customer's website with our suppliers' sites.



What additional products can we offer based on this data?



Identify upselling opportunities from this POS data.



Demo:

AI Employees for Email Marketing

At Wallace we use AI employees to send targeted value driven marketing campaigns to our prospects.

We also use these employees to send out important announcements to customers, distributors, and manufacturers.

Kay Wallace

We use Kay for purchasing and company updates related tasks.

Kay's primary function is to provide our customers, distributors, and manufacturers with important updates. We sometimes use Kay to make buyers at OEMs aware of POS purchases, but we normally focus on engineers for this, which Stanley handles.

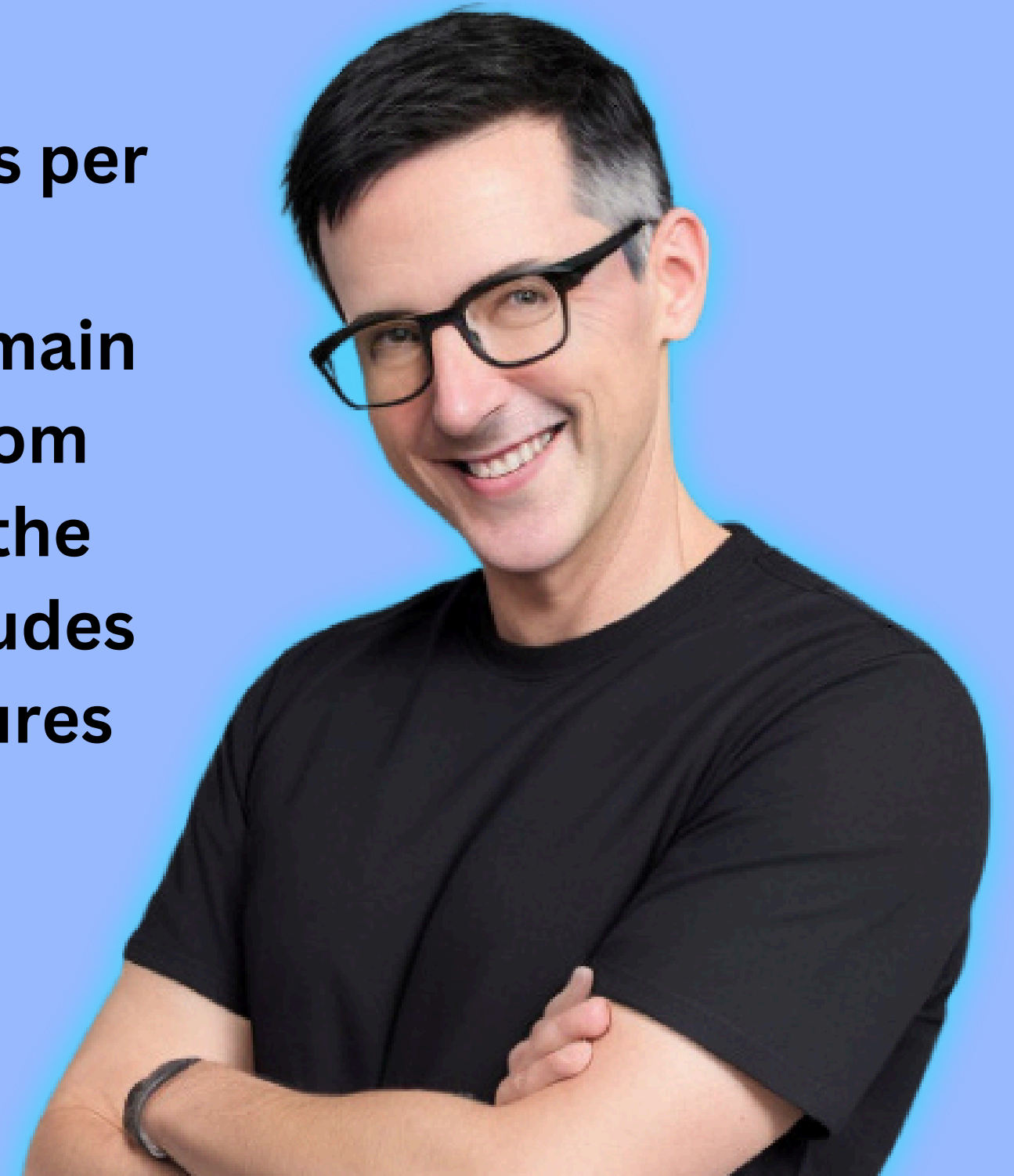


Stanley Wallace

We use Stanley as our engineering contact.

Stanley's primary function is to reach out to POS customers (only engineers) and to understand how they are using our products in their application. We also introduce Wallace as the direct factory support in the territory.

This is meant to create dialogue with new customers.



- No more than 20 emails per account per day
- Create a new email domain to send campaigns from
- No images or pdfs in the first 2 emails. This includes dynamic email signatures

AI INTEGRATION INTO MICROSOFT.





"Time and money are two sides of the same coin. Every minute saved is a dollar earned, and every dollar saved buys you more time."



Copilot Microsoft 365 For Business

PLANS

Choose your plan

Business Enterprise Personal

Microsoft 365 Copilot

\$30.00

user/month with an annual subscription

Or \$31.50 paid monthly
(Annual commitment)

Learn more Get Microsoft 365

For customers with Microsoft 365 for business.

- ✓ Get AI-powered chat grounded in your business data
- ✓ Access Microsoft 365 Copilot in apps such as Teams³, Outlook, Word, PowerPoint and Excel
- ✓ Create and use agents with Copilot Studio⁴
- ✓ Experience enterprise-grade security, privacy, and compliance

A separate license for [a qualifying Microsoft 365 plan](#) is required.

Work Web

+ New chat

Copilot

Get calendar info
When's my next meeting with ?

Prep for that meeting
Help me prepare for

Understand the main points
List key points from

Check Teams mentions
Summarize Teams messages where I have been @mentioned this week

Jump-start a draft
Create an FAQ based on

Generate ideas
List ideas for a fun remote team building event



- Summarize Data:** Quickly summarize large datasets, helping you identify significant patterns, outliers, or trends without the need for complex formulas.
- Create Charts:** Instantly transform raw numbers into clear, visually appealing charts, such as bar charts, line graphs, or pie charts.
- Find Correlations:** Analyze multiple datasets to identify potential correlations, making it easier for you to spot trends and make data-driven decisions.
- Create PivotTables:** Simplify the process of creating PivotTables, allowing you to summarize data and find trends with just a single prompt.
- Visualize Data:** Create data visualizations, such as charts and graphs, to help you understand and process data visually.



- Email Prioritization and Management:** Helps you organize and manage your emails efficiently. It can filter out less critical emails from more important ones using the Focused Inbox feature, allowing you to prioritize urgent messages.
- Smart Summaries:** Summarize emails, saving you time by providing a quick overview of the content without needing to open each email individually.
- Drafting and Composing Emails:** Draft emails for you based on the context you provide. You can ask it to draft an email about a specific topic, and it will generate a professional draft that you can then tailor to your liking.
- Meeting Preparation:** Helps you prepare for meetings by summarizing key information such as meeting-related emails, documents, tasks, and recaps of previous meetings.
- Rewrite and Refine:** If the initial draft of an email doesn't meet your expectations, Copilot can help you refine it. You can ask it to change the tone, length, or specific content to better suit your needs.



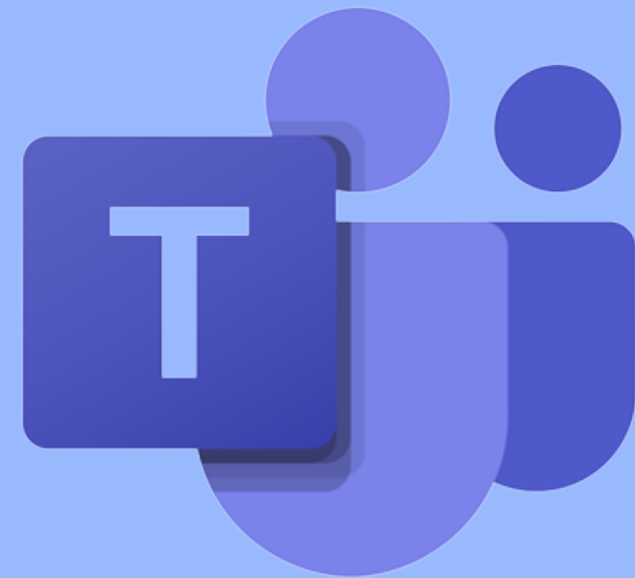
Copilot



- Assist with Drafting Documents:** Help you go from a blank page to a complete draft in a fraction of the time it would take to compose text on your own. You can provide a simple sentence or a more complex request, and Copilot will generate a comprehensive draft.
- Rewrite and Edit Content:** Beyond generating initial drafts, Copilot can revise and enhance documents according to your preferences. You can ask it to rewrite and edit your content, making it more professional or concise.
- Summarize Documents:** Summarize lengthy documents into bullet points, saving you time and letting you gather key points quickly. It can also generate insights on the document, providing a deeper analysis.
- Transform Existing Content:** Helps you transform your existing content into a polished document. It can refine the language, improve the structure, and ensure that your document meets professional standards.
- Inspire New Content:** If you're stuck, Copilot can provide inspiration by continuing to write based on the content already in your document. This feature is especially useful for overcoming writer's block.



Copilot



-Enhanced Meeting Efficiency: Copilot can summarize key discussion points, provide valuable suggestions, and recommend next steps during meetings. **This helps streamline meeting coordination and ensures that important details are captured and acted upon1.**

-Improved Collaboration: By integrating seamlessly with Teams, Copilot allows users to collaborate more effectively. **It can assist in managing tasks, sharing files, and coordinating projects, making teamwork more efficient and cohesive1.**

-Automated Task Management: Copilot can help automate routine tasks such as scheduling meetings, setting reminders, and managing to-do lists. **This reduces the administrative burden on users and allows them to focus on more critical tasks1.**

-Enhanced Security and Compliance: Copilot integrates with Microsoft 365's security and compliance features, ensuring that all data and communications are protected according to your organization's policies. **This includes data encryption, access controls, and compliance with industry standards2.**



-Understand Your Notes: Copilot can help you make sense of your notes by generating summaries, creating task lists, analyzing your ideas, and rewriting your notes for clarity.

-Create New Content: Whether you need event plans, presentation outlines, meeting drafts (agendas, discussion points, key objectives, action items, etc.), or brainstorming ideas, Copilot can assist in creating new content.

-Chat with Copilot: You can interact with Copilot in real-time to receive responses to your prompts and get assistance with various tasks.

-Take Notes Efficiently: Copilot helps you save time and boost productivity by using natural language prompts to gather and create notes. It can pull relevant information from Microsoft 365 documents, messages, and emails directly onto your OneNote canvas.

-Refine and Regenerate Content: If the content generated by Copilot isn't exactly what you're looking for, you can refine your prompt or regenerate the response to better align with your needs.



Copilot



- Copilot in OneDrive can extract information from multiple files without even opening them, saving you time and effort.
- It can compare the key differences between documents with just a single click, making it easier to identify changes and updates.
- Copilot can quickly summarize files in your OneDrive, allowing you to stay updated on important files without spending hours reading through them.
- It can generate insights from your documents and help you jumpstart your work by providing relevant information and suggestions.
- Copilot can answer complex questions by analyzing the content of your OneDrive files and pulling the right information from across your stored data.

**HOW TO IMPLEMENT
AI INTO YOUR
BUSINESS/DAY TO
DAY?**

**PRODUCTS WORTH
CONSIDERING.**



BugEye Board Image

Component	Markings (if visible)	Manufacturer	Potential Solutions from EAS	Notes
Main IC	Lattice ECP5UM5G-85F	Lattice	Lattice ECP5UM5G-85F FPGA	✅ Confirmed match! This FPGA aligns with the board's complexity.
Ethernet PHY	VSC8541	Diodes Inc.	VSC8541 Ethernet Transceiver	✅ Confirmed! This is a common Ethernet PHY.
SRAM	IS61WV12816BLL-10TLI	ISSI	ISSI IS61WV12816BLL 128Mbit SRAM	✅ Exact match!
Crystal Oscillator	ABS07-33.333MHZ-T	Abracon	Abracon AXTAL series ABS07-33.333MHZ-T, cons	✅ Confirmed! SII offers suitable alternatives.
Ethernet Connector	Cinch 74110-108LF	Cinch	Cinch 74110-108LF RJ45 Connector	✅ Confirmed!
USB Connector	DC-USB-AB-SMT-TR	Cinch	Cinch DC-USB-AB-SMT-TR USB Connector	✅ Confirmed!
Power Management IC	Ablic S-812C33AUA-C2T1U	Ablic	Ablic S-812C series	✅ Confirmed!
Resistors	(various)			🇮🇹 We'll need values for specific recommendations.
Capacitors	(various)			🇮🇹 We'll need values and types for specific recommendations.
LEDs	(various)			💡 We'll need specifics to recommend suitable replacements.
Connectors	(various, possibly headers and power connectors)		3M or Cinch	🔦 We'll need types and pin configurations for recommendations.
Unidentified ICs	(at least 3, possibly for interface or communicac			🔍 We'll need more information to identify these and suggest solutions.

Paragraph AI

ParagraphAI is a super handy AI writing tool that helps you quickly draft, edit, or translate text like emails or reports. It can tweak grammar, adjust your tone, and even suggest email replies. Plus, it supports over 40 languages.

There are some cons as ParagraphAI does not have an Outlook extension which does require a bit of copying and pasting.



Lavender

Lavender is an AI-powered email coach that helps sales teams write better emails and get more replies. It scores your emails and gives real-time suggestions to improve personalization, structure, and tone. If you're a sales rep who needs help writing emails, Lavender can save you time and boost your reply rates. It's easy to use, integrates with tools like Gmail and Outlook, and offers data-driven insights to improve your email skills.



Otter AI

Otter.ai is an AI-powered transcription and note-taking platform that enhances productivity through real-time speech-to-text conversion. It leverages machine learning to generate accurate meeting notes, summaries, and captions, making collaboration seamless across teams. With integrations for Zoom, Google Meet, and Microsoft Teams, Otter automates documentation, improves accessibility, and streamlines workflow efficiency. Businesses use Otter to enhance communication, save time, and leverage AI-driven insights, making it a powerful tool for AI integration in modern workplaces.



Otter.ai



LETS DISCUSS...