INDUSTRIAL DISTRIBUTION

AI that pays back in distribution

Six case studies and twenty use cases for the work behind every order: catalogs, purchase orders, inventory, pricing, sales, and billing.

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FOR
Industrial distributors and the manufacturers they serve

INSIDE
6 case studies, 20 use cases

Embrace Digital. Stay Human.

01 Summary

Industrial distribution runs on thin margins, wide catalogs, and orders that arrive every way at once: email, fax, portal, and EDI. The AI work that pays back here is rarely a chatbot or another software subscription. It is a set of narrow builds around the systems you already run, aimed at the hours, errors, and cash that sit inside your control.

The six engagements in this document are delivered work in businesses that share distribution's shape: large catalogs, inside sales teams, multi-location operations, and billing that spans more than one system. Twenty use cases follow, organized by the six areas where distributors spend the most time, along with how an engagement starts.

900
Product pages rebuilt for a safety equipment supplier in 20 business days

200
Hours a month of billing re-keying removed for a franchise operation

5,000+
Sales calls turned into CRM data with zero manual tagging

Inside

02 Why controllable gains matter in distribution

03 Six case studies

04 Twenty use cases for distributors

05 How an engagement starts

06 Questions for a first conversation

02 Why controllable gains matter in distribution

A mid-size industrial distributor typically earns a 20 to 25% gross margin and a 3 to 5% net margin, and turns its inventory three to four times a year. At those margins, a modest operational gain carries far more weight than it appears to. The model below shows why, using one illustrative business.

A $50 million distributor ILLUSTRATIVE

Revenue	**$50.0M**
Gross profit at 22%	**$11.0M**
Net profit at 4%	**$2.0M**
Inventory at 3.5 turns	**$11.1M**

What a controllable gain is worth

The gain	What it is worth
$100,000 of admin and rework taken out	Net profit up 5%, from $2.0M to $2.1M. The same profit as about $2.5M of new sales.
Inventory turns from 3.5 to 4.0	About $1.4M of cash released from the warehouse.
A 40-hour weekly task brought to 10 hours	About 1,500 hours a year back for selling and service.

At a 4% net margin, every $100,000 of cost taken out is worth the profit on $2.5 million of new sales.

That is why this work is measured in hours, errors, cycle time, and cash, the outcomes inside a distributor's control, rather than in promised revenue growth. The hours that come back go to selling, service, and the projects the team has not had time for.

None of it requires replacing your ERP. Most of the value sits in the gaps between systems you already own: the export that gets re-keyed, the PDF that gets typed in, the spreadsheet that holds the real process.

03 Six case studies

Each engagement started with a business problem, not a technology, and each closes with how the same build applies in a distribution business.

CASE 01 · PRODUCT DATA AND CATALOG

A 900-product catalog rebuilt in 20 business days

Interwest · Road safety equipment supplier · Signs, traffic cones, and work zone equipment

900	20 days	12
Product pages rebuilt for search and sale	Business days from start to delivery	Search and copywriting elements written for every product

THE SITUATION

Interwest had a strong offline sales pipeline and real brand equity, but its online catalog was hard to find, with thin product descriptions and little search optimization. The agency it had hired was making progress, slowly and at high expense.

BEFORE	AFTER
1 An agency rewrote product pages by hand, one at a time	1 A content engine grounded in industry research and Interwest's own product data
2 About one product finished a day	2 The full catalog processed in a single pipeline
3 A projected two to three years to finish the catalog	3 Every product page rewritten for search, with images re-tagged
4 Other website projects waiting until the catalog was done	4 All 900 products delivered within 20 business days

In distribution: the same engine works on an item master. Standard descriptions, attributes, and units of measure; supplier data turned into web-ready copy; and new items set up the same way every time.

CASE 02 · SALES AND PRICING INTELLIGENCE

Every sales call turned into CRM data, automatically

Recreational equipment manufacturer · 17,000+ SKUs · Nine buyer types · HubSpot

20	5,000+	Zero
Data points captured from every call	Past calls processed in one batch	Manual tagging or data entry

THE SITUATION

The sales team takes thousands of calls a year from nine distinct buyer types across a catalog of more than 17,000 SKUs. Every call held useful detail: competitor mentions, warranty patterns, and buying signals. Almost none of it reached the CRM.

BEFORE

1. The call tracking system tagged calls by rigid keyword match
2. Patterns surfaced only through manual review
3. Nothing from the calls enriched HubSpot
4. Insights stayed in recordings no one replayed

AFTER

1. The analysis starts on its own the moment a call ends
2. Six AI steps classify the caller, pull out sales details, categorize the call, check whether the issue was resolved, score urgency, and write a summary with follow-ups
3. An agent updates contacts, companies, and deals in HubSpot
4. A dashboard alerts the team to high-intent buyers, escalations, and negative sentiment

The client came back for two more projects. The sales inbox now runs through the same pipeline, and a competitor price tracker matches their products to competitor listings, keeps a monthly price history, and alerts on price moves.

In distribution: inside sales and counter teams take the same calls and emails. The detail lands in the CRM instead of in someone's memory, and the price tracker shows where the catalog sits against the market.

CASE 03 · ORDER INTAKE AND CONTRACT PRICING

Jobs, contracts, and invoices on one platform, with AI reading the paperwork

Utility installation contractor · Seven field and office roles · Dozens of active job sites

30 to 38
Hours a week returned across the team

60%
Of manual work removed through document reading and automatic invoicing

2 to 3x
The work volume, handled by the same team

THE SITUATION

The company coordinates gas, trenching, and construction services across dozens of job sites, and every contract carries its own pricing rules: per-unit rates, tiered lookups, matrix pricing, and thresholds. Scoping, scheduling, pricing, invoicing, and customer updates all ran through a website never designed for any of it.

BEFORE

1. Core screens took more than ten seconds to load
2. Nothing was automated, and incoming work was entered by hand
3. Foremen spent hours organizing job photos
4. Admins chased invoice reminders and tracked certification expirations on a spreadsheet

AFTER

1. Inbound emails are read and turned into jobs automatically
2. Spreadsheets and photographed documents are imported with text recognition
3. Contract PDFs are parsed into pricing rules across nine calculation methods, with a person reviewing before anything goes live
4. Invoices generate as work is completed, and alerts arrive before a certification expires

Admins got back 15 to 20 hours a week, foremen 5 to 8, and management about 10. Core screens now load in under two seconds. The platform was delivered in three months against a six-month scope.

In distribution: this is the purchase order problem. Orders that arrive by email, fax, PDF, and EDI are read, matched to customer part numbers and contract prices, and staged in the ERP for a person to approve.

CASE 04 · BILLING AND RECEIVABLES

A two-week billing cycle cut to about two hours

Commercial cleaning franchise · A required legacy franchise system alongside a modern billing platform

2 hours
Per billing cycle, down from two weeks

200
Hours a month of manual re-keying removed

Zero
Manual data entry between the two systems

THE SITUATION

The business had to use a legacy system required by its franchisor, while billing ran on a modern platform. The two did not talk, so every billing cycle depended on people moving data between them. Rather than replace either system, we built a translation layer that sits between them.

BEFORE

1. Export from the legacy system to a spreadsheet
2. Re-key the data into the billing format
3. Cross-check line items for errors
4. Fix discrepancies, re-export, and repeat
5. Resolve billing disputes after the fact

AFTER

1. Staff load one export into a small web app
2. AI maps the data using the business's own contract and pricing rules
3. Inconsistencies are flagged before invoicing
4. Clean invoices go into the billing platform, with no re-work

> *What used to be a two-week process now takes just a few hours. My accounting department is already working in the new system and I'm looking forward to the cost savings.*
>
> Chief Financial Officer, Commercial Cleaning Franchise

In distribution: most distributors run an ERP next to separate billing, ecommerce, or rebate systems. A narrow bridge between them removes the re-keying without replacing a system.

CASE 05 · SALES AND CUSTOMER SERVICE

Hot leads routed to the right rep in minutes

Commercial cleaning franchise · HubSpot

Minutes	24/7	Zero
From a hot lead to the right rep	Intent scoring on every lead	Manual lead triage by the sales manager

THE SITUATION

Hundreds of leads a month arrived in HubSpot with no way to tell hot from cold. The team closed 13% of leads, while its veteran closers reached 26%.

BEFORE

1. Reps started the day working the list top-down
2. The sales manager triaged leads by feel
3. The hottest prospects waited in the queue for days
4. Every call started from scratch, with no context

AFTER

1. An AI agent inside HubSpot scores every lead across page visits, form fills, email engagement, and account signals
2. Each hot lead reaches the right rep in minutes
3. Context and a suggested call script are already attached
4. The agent does the triage; reps spend the day selling

In distribution: web quote requests, counter inquiries, and new account applications are scored and routed the same way, so the largest opportunities reach a rep first.

CASE 06 · MULTI-LOCATION CONTENT

Unique pages for 125 locations in 16 business days

Waste management franchisor · 125 locations across the United States

1,000	125	600+
Unique local pages written	Locations covered	Hours of team time saved

THE SITUATION

The franchisor needed search pages for every one of its locations, each written for its own market and able to rank on its own.

BEFORE

1. Unique copy for each market meant writing by hand
2. Six months or more of work and a team of writers
3. Templates as the only faster option, and templates do not rank

AFTER

1. A content engine analyzed each location's service mix
2. It studied local competitor language and regional search patterns
3. It wrote pages with genuine local context, each earning its own ranking

> *What would have taken months was finished in just 16 business days, saving our team over 600 hours and ensuring consistent, high-quality content across all locations.*
>
> Marketing Director, Waste Management Franchisor

In distribution: a page for every branch, with its local product lines, services, and contacts, written once and kept current.

04 Twenty use cases for distributors

Each use case starts as a narrow build on one process, connected to the systems already in place. They are grouped by the six areas where distributors spend the most time.

CASE 01 Delivered, see the case study

PATTERN 03 Built on a delivered pattern

READY TO SCOPE Shaped to your systems

Product data and catalog

Tens of thousands of SKUs, supplier data in every format, and descriptions written by whoever set the item up.

Use case	What it does	What we measure	Proof
Catalog cleanup and enrichment	Standardizes descriptions, attributes, and units of measure across the item master and writes web-ready copy	Items completed per week, attribute completeness	CASE 01
New item setup from supplier files	Reads supplier spec sheets and price files, fills your item template and product coding, and flags likely duplicates	Setup time per SKU, coding errors	READY TO SCOPE
Part number cross-reference	Matches customer and competitor part numbers to your SKUs and suggests substitutes when an item is out of stock	Match rate, time per quote	READY TO SCOPE

Order intake

Purchase orders arrive by email, fax, PDF, portal, and EDI, and someone reconciles each one into the ERP.

Use case	What it does	What we measure	Proof
Purchase order intake	Reads incoming POs from email, fax, and PDF, matches part numbers, prices, and ship-to details, and stages a sales order in the ERP for a person to approve	Minutes per order, keying errors	PATTERN 03
Order exception triage	Catches price mismatches, unknown items, and credit holds, and routes each to the right person with the context attached	Exceptions cleared the same day	READY TO SCOPE
Order status replies	Drafts answers to order status emails from ERP and carrier data for a rep to review and send	Response time, status calls received	READY TO SCOPE

Inventory and purchasing

Months of stock on the shelf, velocity that varies by SKU and branch, and buying decisions made in spreadsheets.

Use case	What it does	What we measure	Proof
Stock position watch	Shows stock status by location today and weeks out, against open POs and demand, and flags shortfalls and overstock	Stock-outs, inventory turns	READY TO SCOPE
Velocity classes on a schedule	Refreshes ABC classes by SKU and branch and lists slow movers with options: transfer, return to vendor, or promote	Cash held in slow-moving stock	READY TO SCOPE
Supplier quote comparison	Reads quote attachments from email and lines up price, lead time, and terms side by side	Buyer hours per quote round	READY TO SCOPE
Replenishment suggestions	Proposes reorder quantities from usage and lead times for a buyer to approve. Nothing is ordered without a person.	Turns, fill rate	READY TO SCOPE

Pricing and market intelligence

Price files from hundreds of suppliers, customer-specific contracts, and limited visibility into where the market sits.

Use case	What it does	What we measure	Proof
Competitor price tracking	Matches your items to competitor listings, keeps a price history, and alerts on price moves	Items covered, margin by category	CASE 02
Contract price checks	Compares invoiced prices to contract and customer-specific pricing and flags leakage before invoices go out	Pricing errors, credits issued	PATTERN 03
Quote builder	Assembles quotes from price rules, margin floors, and stock position for a rep to review and send	Quote turnaround, quote margin	READY TO SCOPE

Sales and customer service

Inside sales, counter, and outside reps capture what customers say in notes, when there is time to write them.

Use case	What it does	What we measure	Proof
Call and email intelligence	Turns every sales call and email into structured CRM data, with alerts on buying signals and escalations	Data captured per call, CRM completeness	CASE 02
Lead scoring and routing	Scores web and inbound leads and sends the hot ones to the right rep with context	Time to first contact, close rate	CASE 05
Open quote follow-up	Surfaces quotes going stale and drafts follow-ups for the rep to send	Quote conversion rate	READY TO SCOPE
Branch and location pages	Writes and maintains a unique page for every branch	Pages live, local search traffic	CASE 06

Billing, receivables, and rebates

The ERP, the billing platform, and supplier programs each hold part of the picture.

Use case	What it does	What we measure	Proof
System-to-system billing bridge	Moves billing data between systems that do not talk, with checks before anything is invoiced	Hours per billing cycle, disputes	CASE 04
Collections priorities	Ranks past-due accounts by balance and age and drafts reminders for receivables staff to send	Days sales outstanding, past-due balance	READY TO SCOPE
Rebate and claim tracking	Matches sales to manufacturer rebate and special-pricing programs and prepares the claims	Rebates claimed against rebates earned	READY TO SCOPE

05 How an engagement starts

Every engagement is built around the business in front of us. There is no off-the-shelf package to install. The sequence below is how the work begins.

1

A first conversation about money and time

Where the largest spend sits, which task repeats every week, and which process lives in one person's head. The conversation starts with the business, not with technology.

2

Discovery across the whole team

Department heads describe how work should run, and the people doing it describe how it does. A short, AI-guided conversation with each person maps their tools, workload, and ideas, so the picture covers the whole company and not only the org chart.

3

A first build on one process

A narrow first project on the process with the clearest payback. Your team checks the results against the way they do it today before anything goes live.

4

A roadmap and a dedicated engineer

Once the first build proves out, an engineer is assigned to your account and works through a prioritized list of opportunities. Each build adds to the last.

Your systems stay

We connect to your ERP, CRM, and email rather than asking you to replace them.

You own what we build

The workflows, data, and tools built for your business belong to your business.

Works on any AI platform

Builds work across Microsoft Copilot, ChatGPT, and Claude, so a change of platform never strands the work.

People stay in charge

AI drafts, checks, and stages the work. Your team approves anything that commits money or goes to a customer or supplier.

06 Questions for a first conversation

The most valuable starting point is usually the one that costs the most today. These questions find it quickly.

- Where does the most money go today: software, labor, freight, or rework?
- Which weekly task would your team stop tomorrow if they could?
- How do customer orders arrive, and how many are keyed in by hand?
- How many months of inventory are on the shelf, and which branches carry the most?
- Which of your systems do not talk to each other?
- What is not getting done because the team is busy with admin?

A first conversation is a discussion between peers. It ends with one or two processes worth a closer look and a clear sense of what each is worth to your business.

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Case study figures are as measured at delivery. Clients other than Interwest are described by industry. Quotes are from client stakeholders.

The model in section 02 is illustrative arithmetic, not a client result. It assumes a 22% gross margin, a 4% net margin, and 3.5 inventory turns on $39.0M cost of goods sold. Every business differs; a first conversation replaces these assumptions with your own figures.