



Rep GEI Dashboard Supporting Documentation

Greenheck Effectiveness Index:

The Greenheck Effectiveness Index calculates our rep partner's market effectiveness. In simple terms, the index is calculated as the rep partner's intake against the opportunity in their area.

The dashboard offers two views:

1. Corporate Office
2. Trading Area

The index is calculated 3 different ways:

1. **Effectiveness Index Rep All:** rep partner's total intake regardless of where it was shipped to (includes both in and out of territory) divided by the market opportunity for that territory. This can be misleading since it is not always an apples-to-apples comparison.
2. **Effectiveness Index Rep Adjusted (In Territory):** rep partner's intake in territory, excluding intake shipped outside of territory (if there is not a ship to county, the model assumes this intake as in territory) divided by the market opportunity for that territory. Good measure of rep effectiveness.
3. **Effectiveness Index GF All:** All Greenheck Mechanical Rep intake shipped into the territory regardless of whole sold it divided by the market opportunity for that same territory. Good measure of Greenheck's effectiveness.

The index is shown three ways:

- Total (CVP, AMP, ACP, New Ventures, and Accurex Intake)
- Airside (AMP and ACP Intake)
- Applied (CVP)

SAP: Order Intake and Dodge: Historical

- Purpose: calculate rep partner's effectiveness index
- Start date: first index calculated for 12 months ending in September 2023 (Q2 FY 24)
- Filters: Canada intake is filtered out
- Notes:
 - Indexes will be recalculated quarterly
 - HVAC% is applied to market opportunity dollars
 - Lowest level of granularity is rep office ID
 - Market opportunity dollars for non-residential market including apartments in the US
 - Indexes may change due to updated market opportunity dollars received from Dodge (addition of projects to historical dataset or shifting of project construction starts)
 - Large jobs can swing the index one way or another in a small market

Financial Metrics

- Data context:
 - The GEI metric includes a measure of gross margin %





- Gross Margin excludes ATU, GRD, HR, MFG SL, MFG SVC, MKTG, SS OTHER, and SALES (ATU and GRD will be included in the future)