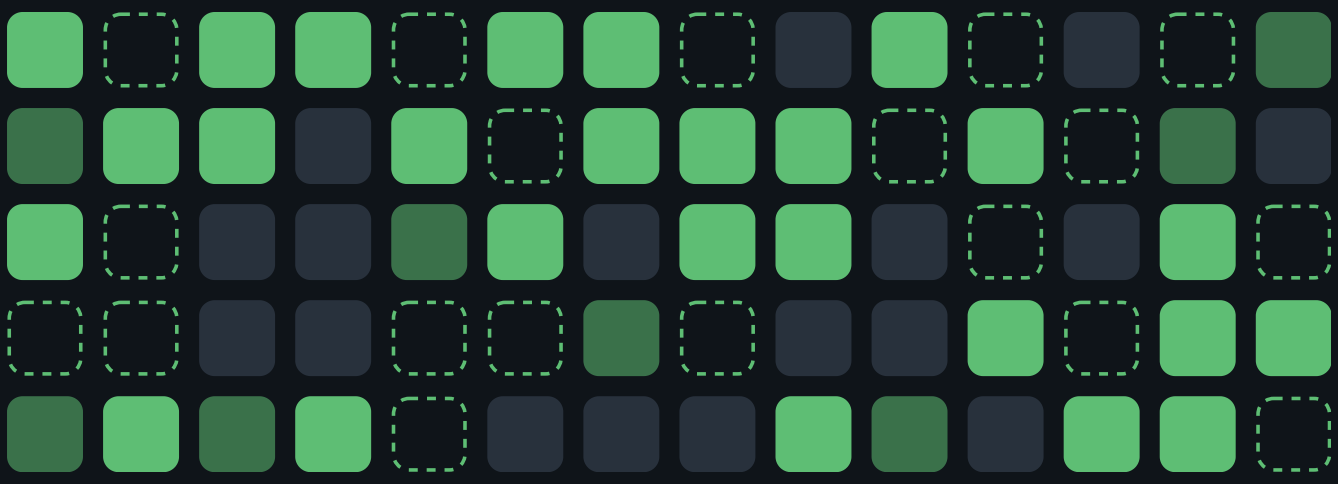
relevate ai

A PLAYBOOK FOR MANUFACTURERS' REP FIRMS

The Revenue Already in Your Territory

How multi-line rep firms find the cross-sell, new-account and at-risk commission dollars sitting in data they already have, without adding headcount.



Includes 7 worksheets, a self-assessment and a 30-day plan

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Who this is for

Owners, presidents, sales managers and operations leaders at independent, multi-line manufacturers' representative firms in the United States.

How to use it

Every chapter ends in something you can fill in. You can run the whole method in spreadsheets. Chapter 8 covers where software takes over the labor.

About the examples

Firms, accounts and figures in worked examples are hypothetical and marked "Illustrative." Outside statistics are cited on page 18.

INTRODUCTION

You're already holding the evidence

Somewhere in your territory is a customer who has bought connectors from one of your principals for eleven years and has never been quoted the power supplies, sensors or cable assemblies on the same line card.

Nobody decided that. The account belongs to a salesperson who grew up on the connector line. The purchases show up on one principal's commission statement. And nothing in your office puts that statement next to the other eleven.

This playbook is about that gap. It is not a new sales methodology, and it does not ask your people for more activity. The argument is narrower: most multi-line rep firms already hold the evidence of next year's growth, and they use it for one job, which is checking that the commission check is right.

The pressure to do more with it is real. NEMRA, the electrical reps' association, said in March 2026 that the cost of running an agency keeps climbing while average commission rates have declined over the past decade.[4] MANA's guidance is that commission rates tend to hold steady for long stretches,[1] so a better rate is rarely the way out. Growth has to come from selling more of the line card to more of the territory with roughly the people you have.

10–40%

of a rep's compensation may be affected by gaps in distributor POS reporting, per NEMRA's 2014 study of the electrical channel.[4]

8+ hrs

a week is what reps in that study estimated they spend reconciling POS reports.[5]

30 days

is a common termination notice in rep agreements. Attorneys who advise MANA members would rather see 60, 90 or 180.[7]

Read those three together. A meaningful share of income depends on data other companies produce. Reconciling it eats a working day a week. And the lines that pay you can leave on a month's notice. The same records that create that exposure also show where the next dollars are. The chapters that follow sort them into three pools: accounts that should be buying more of your lines, companies that should be accounts, and commission you could lose without seeing it coming.

01 THE PROBLEM

Why you can't see your own territory

A rep firm sits in the middle of a sale it never invoices. Your principals ship and bill. Distributors stock and resell. The customer designs in, specifies or buys. You are paid a commission by the principal for the business you influence in your territory.

That arrangement is the reason manufacturers use reps. It is also the reason the record of your own business lives in other companies' systems.

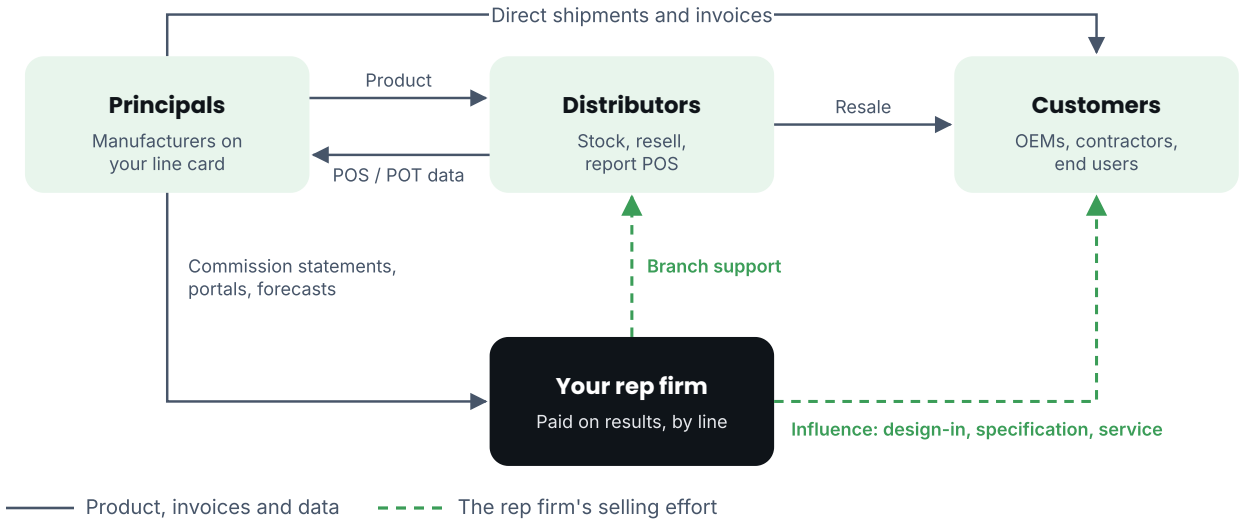

FIGURE 1 Who touches the sale. Product and invoices move along the top and bottom. The rep firm's influence runs to customers and distributor branches, and its view of the result arrives later, one principal at a time.

Distribution adds a second complication. ERA's *Representor* describes two ways a manufacturer can measure the revenue behind your commission: point of acquisition (POA), what the distributor buys from the manufacturer, or point of sale (POS), what the distributor sells on to the end customer.[3] Under POS, the manufacturer depends on customer-level data supplied by the distributor. In the electrical channel, more than 95% of manufacturers NEMRA surveyed used POS data for rep compensation.[5]

So the facts about one customer can reach you through a principal's statement, a distributor's POS file, your own CRM and a salesperson's memory. Each is accurate about its own slice.

What each source knows, and what it can't tell you

SOURCE	WHAT IT KNOWS	WHAT IT CAN'T TELL YOU
Commission statements	Invoiced sales and commission by customer, for one principal, in that principal's format	What the same customer buys on your other lines
Distributor POS and POT reports	Which end customers and ZIP codes product reached through distribution	Whether "that" customer is one you already call on under another name
Your CRM	Contacts, call notes, quotes, opportunities	Actual sales, or whether a "key account" is growing or fading
Principal portals and forecasts	Bookings, backlog and design registrations for one line	Anything across lines
Spreadsheets and memory	Why an account buys and who really decides	Anything, once that person retires

> The problem isn't missing data. Every source is organized by principal, and your opportunity is organized by customer.

Before any of it can be lined up, there is a plainer obstacle: the same customer is spelled differently everywhere.

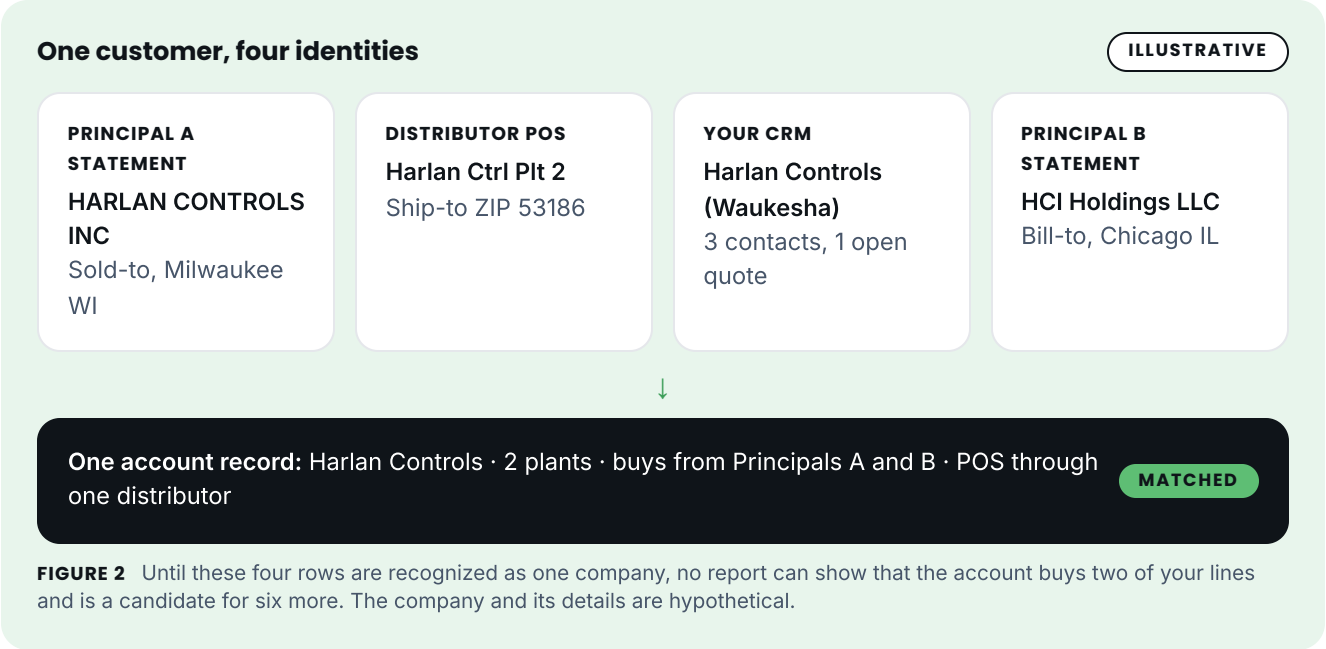

FIGURE 2 Until these four rows are recognized as one company, no report can show that the account buys two of your lines and is a candidate for six more. The company and its details are hypothetical.

Most firms solve this the same way: someone in the office knows. That works until the firm adds lines, adds a state or loses that someone. Matching names is unglamorous. It is also the step everything else in this playbook depends on.

02 THE FRAMEWORK

Three pools of revenue, one grid

Once customers are matched across sources, the whole method runs off a single sheet. Put customers down the side and your lines across the top. In each cell, put the last 12 to 24 months of commissionable sales. Then read it three ways.

EXPAND

Empty cells at accounts that fit

Customers buying one or two lines when their products could use four or five. This is the fastest pool to work because the relationship exists.

You're looking for: open cells where the line fits.

ACQUIRE

Rows that don't exist yet

Companies in the territory that resemble your best customers and aren't in the grid, plus end customers on POS reports that nobody at your firm has called.

You're looking for: missing rows with a reason to call.

PROTECT

Cells that used to be full

Accounts whose orders have slowed, lines an account has quietly stopped buying, and commission that depends too heavily on one principal or one customer.

You're looking for: shrinking cells and heavy columns.

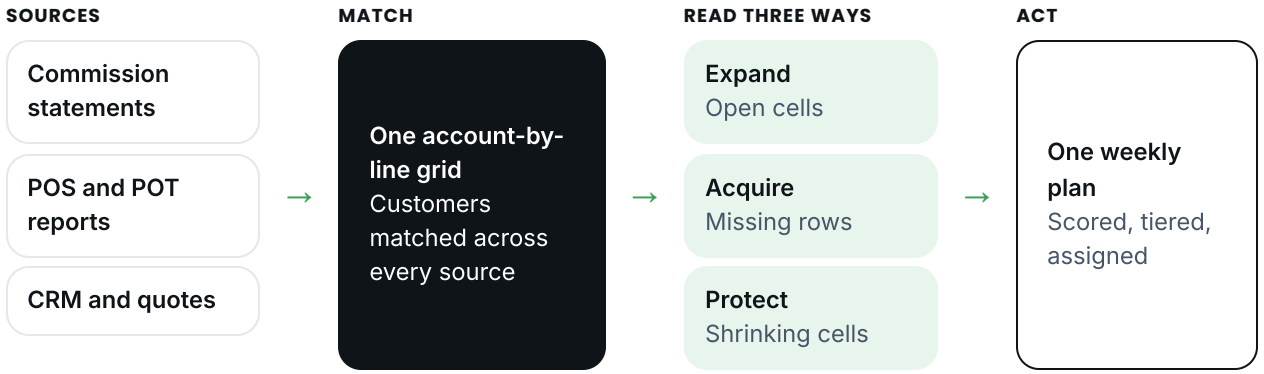

FIGURE 3 The revenue opportunity framework. One matched grid produces three working lists, which feed a single weekly plan.

Two rules keep this honest. First, the grid shows where to look, and your salespeople decide what is real. An empty cell can be empty for a good reason. Second, the three lists compete for the same hours, so Chapter 6 puts them into one plan. A firm that chases every open cell will neglect the accounts that pay the bills.

The order matters, too. Start with Expand, because the first results arrive quickly. Acquire takes longer and is where long-run growth comes from.

03 EXPAND

The account-by-line grid

Writers in MANA's *Agency Sales* have called it synergistic selling for decades: a line card built so its lines fit the same customers.[8] An open cell at a fit account is that strategy not yet carried out. Here is what the grid looks like for a hypothetical electronics rep firm with 12 principals across eight product categories.

Account expansion matrix: eight accounts, eight product categories ILLUSTRATIVE

Account	Connectors	Power supplies	Passives	Sensors	Thermal	Cable assemblies	Displays	Relays, switches	Open
Industrial controls OEM	■	OPEN	■	OPEN	OPEN	■		■	3
Medical device OEM	■	■	■	OPEN		OPEN	OPEN		3
Ag equipment OEM	■	OPEN		OPEN		■	OPEN	▼	3
EMS provider	■		■					■	0
HVAC controls OEM	OPEN	■	OPEN	■		OPEN		■	3
Test & measurement OEM	■	■	▼	OPEN	OPEN		■		2
EV charging manufacturer	OPEN	■		OPEN	■	OPEN	OPEN	OPEN	5
LED lighting OEM	OPEN	■	■		OPEN				2

■ Buying OPEN Fits, not buying ▼ Buying, declining Not a fit

FIGURE 4 Twenty-one open cells in eight accounts. The EMS provider builds to its customers' bills of materials, so the open opportunity sits with the OEM that owns the design. The two declining cells belong in Chapter 5.

How to build yours

1. **Pick the rows.** Start with your top 50 accounts by commission. That is enough to prove the method.
2. **Pick the columns.** Use lines if you carry 15 or fewer. Use product categories if your line card runs longer.
3. **Fill in the sales.** Twelve months of commissionable sales from statements and POS, by matched customer.
4. **Mark fit.** For each empty cell, the assigned salesperson answers one question: does this customer's product use this category? Yes makes it an open cell. No grays it out.

Score the open cells

A full grid will have hundreds of open cells. Score each one on three questions and multiply.

FACTOR	QUESTION	SCALE
Fit	Does the customer's product need this category?	0 none · 1 possible · 2 likely · 3 certain
Access	Do we know whoever specifies or buys it: the design engineer, purchasing or the distributor branch?	0 no one · 1 a name · 2 a relationship · 3 a champion
Size	If we won it, what is the realistic annual commission?	1 small · 2 medium · 3 large for your firm

Worked example: the industrial controls OEM ILLUSTRATIVE

Power supplies
Fit 3 (every panel needs one) × Access 2 (we know purchasing, not the power engineer) × Size 3

18

Sensors
Fit 2 × Access 2 (same engineering group that designs in our connectors) × Size 2

8

Thermal management
Fit 1 (only on the high-power models) × Access 1 × Size 2

2

The grid found all three. The score says which one gets Tuesday morning. Work the firm's top 20 first.

Check before you call

An open cell is a question. It may already be answered:

- **You are selling it and can't see it.** The customer buys through a distributor that doesn't report POS for your territory. That is a commission question, and it goes on the Protect list.
- **Someone else owns the spec.** A competitor is designed in for the life of the program. Note the next program date and move on.
- **It's a split.** The design happens in another rep's territory. ERA's split-commission guidelines recognize influence at the point of design and recommend that reps track the splits they apply for.[12]

Does this vary by sector? Yes. In **electronics**, open cells usually convert at the design stage, so ask about the next program. In **electrical and lighting**, line cards run long (one Electrical Wholesaling survey reported small lighting rep firms averaging 64 lines[13]), so build the grid by product category, with distributor branches and contractors as rows. In **plumbing and HVAC**, transfers between distributor DCs and branches blur where product ended up,[10] so confirm the ship-to before trusting a blank. For **industrial reps selling direct to OEMs**, the open cells are often other plants or divisions of a parent you already serve.

04 ACQUIRE

A shorter, better prospect list

New-account prospecting loses to existing-account service in most rep firms for a simple reason: the existing account called this morning. More cold calls won't fix that. A short list where every name comes with a reason will. Your own data supplies three kinds.

1. **Names you are already paid on.** POS reports list end customers your CRM has never heard of. A distributor sold your principal's part there. They are customers of one line and strangers to your firm. Compare POS end-customer names to your CRM once a quarter and the gaps are your warmest prospects.
2. **Siblings.** Other plants, divisions and subsidiaries of accounts you serve well. They often share an approved vendor list and an engineering standard. You have a reference inside the company and a different building to visit.
3. **Lookalikes.** Companies in your territory that resemble your best customers and buy nothing from your lines. The profile matters more than the list source, so build it carefully.

> Define "best customer" by how many of your lines they buy, not by dollars alone. Multi-line accounts show what a full-fit customer looks like.

Worksheet: best-customer profile FILL IN

FROM YOUR TOP 20 MULTI-LINE ACCOUNTS	WHAT THEY HAVE IN COMMON
End markets	e.g., industrial controls, medical devices
What they build	e.g., panel-level assemblies with motion and power
Size	Employee range, number of plants in territory
Lines they buy from us	Which three or more, and which one came first
How they buy	Direct, through distribution, through an EMS provider
Who specified first	Design engineering, purchasing, a distributor's recommendation
Disqualifiers	What makes a lookalike a poor fit (captive supply, offshore design)

A workable target: ten new names per salesperson per quarter, each with a written reason. "Builds the same class of drive as our third-largest account, 40 miles away" is a reason. Ten researched names will outperform a purchased list of five hundred, and your salespeople will actually call them.

05 PROTECT

Commission that is quietly at risk

Accounts rarely leave with an announcement. They leave as a pattern in the data that nobody was assigned to watch. Four signals are worth a monthly look:

SIGNAL	WHAT IT LOOKS LIKE IN THE GRID	FIRST MOVE
Reorder gap	An account that ordered every six weeks has been silent for fourteen	Call this week. Ask about inventory, schedule and second sources.
Line drop	Bought four of your lines last year, three this year	Find out who won the fourth and why
POS drift	Sales through one distributor fall while the customer's production hasn't	Check whether business moved to a distributor that reports elsewhere
Backlog shift	A principal's backlog for the account shrinks ahead of shipments	Ask the principal's regional manager what they see

Know your three exposure numbers

MANA's leadership has written that several times a year a member calls to say one principal had grown past half the firm's income and has now terminated.[6] Rep agreements commonly renew automatically until one side gives 30 to 60 days' notice.[14] Three figures belong on the owner's desk every quarter:

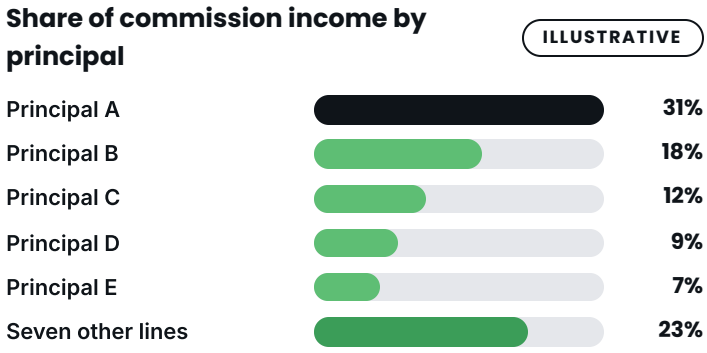

FIGURE 5 Bars are scaled to the largest principal. The top three lines supply 61% of income. The seven smallest average about 3% each.

Top-principal share. Commission from your largest line as a percent of the total.

Top-ten account share. The same test for customers.

30-day exposure. The percent of commission earned under agreements that can end on 30 days' notice.

As a starting point, look hard at any principal above 30%, any customer above 10% and 30-day exposure above half. These are our rules of thumb, not an industry standard.

Look at the small end, too. Consultant John Haskell's "Five Percent Rule" questions any line that doesn't produce 5% of commission income and has no path there within a year or two.[8]

06 TERRITORY AND TIME

Put the hours where the potential is

Most account tiers are built on last year's commission. That hides the mid-size customer with five open cells. Tier on two questions instead: how much is there to gain, and how much is there to lose?

GROW

High open-cell score, healthy account
Planned multi-line calls. Bring the principal's regional manager for the first one.

DEFEND

High commission, risk signal showing
Contact within two weeks. The owner or sales manager joins.

MAINTAIN

High commission, few open cells, no risk
Efficient service. Inside sales carries more of the load.

QUALIFY

New names from Chapter 4
One researched first call each. Promote or drop after two attempts.

Worksheet: territory prioritization (one per salesperson) FILL IN

ACCOUNT	12-MO. COMMISSION	LINES BUYING / FIT	TOP OPEN CELL (SCORE)	RISK SIGNAL	TIER	NEXT ACTION, DATE
Industrial controls OEM (illustrative)	$41,200	4 / 7	Power supplies (18)	None	Grow	Joint call with Principal B RSM, Mar 12
Test & measurement OEM (illustrative)	$36,800	4 / 6	Sensors (12)	Passives down three quarters	Defend	Owner visit, Mar 5

A weekly rhythm that survives a busy week

Monday, 30 minutes
Each salesperson commits to four actions for the week: two Grow, one Defend, one Qualify. Named account, named line, named contact.

During the week
Service calls still happen. The four actions are the part of the week that is planned instead of reactive.

Friday, 10 minutes
Log the outcome against the account and line. Won, quoted, sampled, blocked or not a fit. "Not a fit" grays the cell for good.

Four planned actions a week is about 200 a year per salesperson.

07 PRINCIPALS

Walk into the line review with the numbers

Every principal wants more of your time. The usual defense is a list of calls made. A stronger one is to show, account by account, where their line is bought, where it fits and isn't bought yet, and what you need from them to close the difference. The same grid produces it. Read down a column instead of across a row.

Worksheet: principal performance scorecard (one per line, quarterly) FILL IN

MEASURE	HOW TO CALCULATE IT	THIS QUARTER
Commission, share, trend	12-month commission, percent of firm total, change on prior year	
Account penetration	Accounts buying this line ÷ accounts where it fits	
Open-cell accounts	Named accounts where it fits and isn't bought, with scores	
New accounts opened	First-time buyers of this line in the last 12 months	
At-risk accounts	Buyers of this line showing a Chapter 5 signal	
Door-opener value	Accounts where this line came first and others followed	
Time demand	High, medium or low: reporting, training, joint calls, quoting	
Contract terms	Notice period and post-termination commission	
Our ask of the principal	Samples, pricing support, joint calls, faster quotes, POS detail	

FIGURE 6 The middle rows are the ones a principal rarely sees from any rep. "Door-opener value" echoes a question in MANA's Line Card Profitability Analysis Workbook: does this line open doors for the others?[9]

Three ways to use it

- **In line reviews.** Share the penetration figure and the named open-cell accounts for that principal only. Never show one principal another's numbers.
- **In your own planning.** Lines with low penetration and high fit deserve more selling time. Lines with high time demand, low commission and no door-opener value are Five Percent candidates.
- **When pitching a new line.** "We serve 140 accounts where your category fits, and here is how we know" is a better opening than a line card and a handshake.

08 TECHNOLOGY

Where AI earns its keep

Everything so far can be done in spreadsheets, and firms do it, once. It rarely lasts because the labor comes back every month: new statements in a dozen formats, new POS files, new spellings of old customers. A rep writing for AIM/R in *Supply House Times* put the progression plainly: Excel is the simplest tool for distributor reports, BI software is a step up, and reps can now look to AI models for reporting analysis and reconciliation.[10]

For a rep firm, that comes down to five jobs.

JOB	WHAT IT REPLACES
1 · Read every format	Rekeying or reformatting each principal's statement and each distributor's POS file
2 · Match the same company	The person who "just knows" that HCI Holdings is Harlan Controls
3 · Watch the whole grid	A quarterly spreadsheet exercise that is stale the day it's finished
4 · Answer plain questions	Waiting for someone to build a pivot table. "Which accounts bought connectors but not power supplies in the last 12 months?"
5 · Draft the prep	The hour before a call or line review spent assembling what the firm already knows

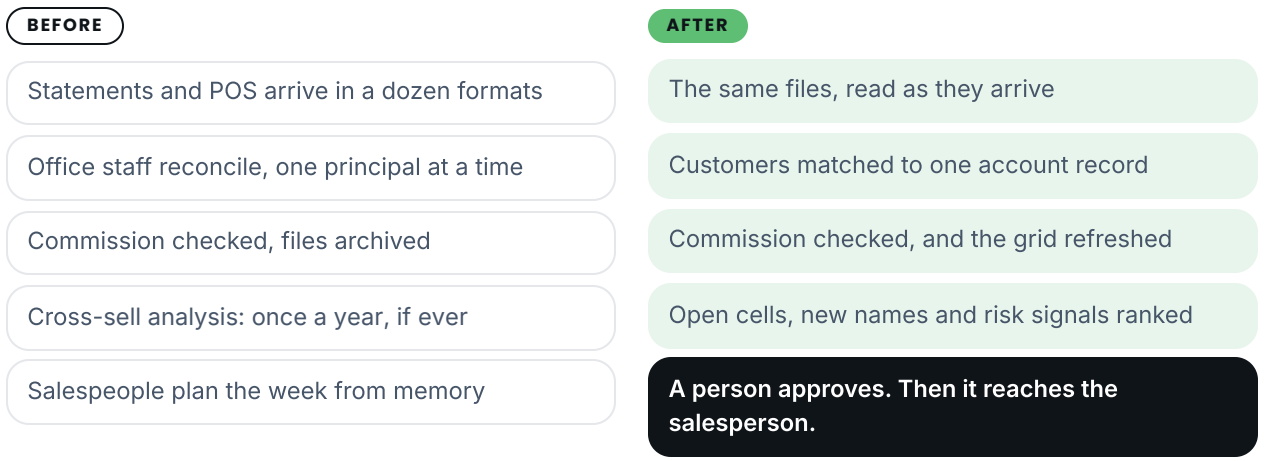

FIGURE 7 The inputs don't change. What changes is that reconciliation stops being the end of the process.

What it should not do is act alone. Software doesn't know that a buyer is about to retire or that a principal's quality problem makes this the wrong month to push the line. Recommendations go to a person first. And every flag should trace back to a statement line or a POS record, because a salesperson who can't see why an account was flagged won't make the call.

What "actionable" looks like

A useful view for an owner fits on one screen and ends in names. The mock-up below shows the kind of information that matters. The figures are invented for this playbook and it is not a product screenshot.

Territory overview · last 12 months

ILLUSTRATIVE DASHBOARD · INVENTED FIGURES

OPEN CELLS, FIT ACCOUNTS	POS CUSTOMERS NOT IN CRM	REORDER GAPS	TOP-PRINCIPAL SHARE
312	**87**	**14**	**31%**
across 418 active accounts	paid on, never called	accounts past normal cycle	30-day exposure: 44%

ASK Which accounts bought connectors but not power supplies in the last 12 months?

THIS WEEK'S SUGGESTED ACTIONS	WHY	TYPE	STATUS
Industrial controls OEM · power supplies	Buys 4 of 7 fit lines. Score 18.	Expand	Approved
Test & measurement OEM · passives	Down three straight quarters	Protect	Approved
Motor drive maker, ZIP 53186	On POS for one line. Not in CRM.	Acquire	To review
EV charging manufacturer · connectors	Five open cells. New program in design.	Expand	To review

Six questions for any vendor

1. Can it take our principals' statements and POS files as they arrive, in their formats?
2. How does it decide two names are one company, and can we correct it?
3. Does it work alongside our CRM and commission system, or expect to replace them?
4. Can a salesperson see why an account was flagged?
5. Who approves before anything reaches a customer or our CRM?
6. Who can see our principals' data, and what happens to it if we leave?

Sales data readiness checklist

- [ ] 12 to 24 months of commission statements per principal, as files
- [ ] POS or POT reports with end-customer name and ZIP
- [ ] CRM account export with addresses
- [ ] Line card with product categories per line
- [ ] Territory definition for each principal
- [ ] Salesperson-to-account assignments
- [ ] Notice period and post-termination terms per agreement
- [ ] One named owner of the customer master list

TOOL

How much of your territory can you see today?

Answer for the firm as it runs this month, without a special project. Give yourself one point for every honest yes.

#	QUESTION	YES	NO
1	Could you list, within an hour, every customer buying one of your lines whose products fit three or more?	☐	☐
2	Do customer names match across commission statements, POS reports and your CRM?	☐	☐
3	Do you know which end customers on POS reports are not in your CRM?	☐	☐
4	Is anyone alerted when a steady account misses its normal reorder window?	☐	☐
5	Do you know your top-principal share and 30-day exposure as of this quarter?	☐	☐
6	Are account tiers based on potential and risk, not only last year's commission?	☐	☐
7	Does each salesperson keep a named new-account list with a reason beside each name?	☐	☐
8	Do you bring account-level penetration figures to line reviews?	☐	☐
9	Could a salesperson hired tomorrow see an account's full multi-line history on day one?	☐	☐
10	Does monthly commission reconciliation take hours, not days?	☐	☐

0–3

The evidence is in the filing cabinet

You are running on relationships and memory. That built the firm, and it leaves the most on the table. Start with the 30-day plan on the next page and limit it to five principals.

4–7

Pieces exist. They aren't connected.

You probably have good commission data and a decent CRM that don't talk to each other. Matching customers across them is your highest-value step.

8–10

You can see it. Now keep it current.

Your risk is that the picture depends on one person or one annual exercise. Put the refresh on a schedule, or automate it.

Take the assessment separately as owner, sales manager and office manager, then compare. The questions where you disagree are the useful ones.

TOOL

Your first 30 days

Scope it small on purpose: your top five principals and top 50 accounts. That covers most of the commission in a typical firm and can be done by an office manager and a sales manager without stopping the business.

1 Week 1 · Gather

- Export 12 months of commission statements for five principals
- Pull POS reports and a CRM account list
- Work through the readiness checklist
- Calculate your three exposure numbers

Output: one folder, one page of exposure figures

2 Week 2 · Match and build

- Match customer names across sources for the top 50
- Build the account-by-line grid
- Salespeople mark fit on empty cells
- List POS customers missing from CRM

Output: the grid, with open cells marked

3 Week 3 · Score and assign

- Score open cells. Keep the top 20.
- Pick ten new names with reasons
- Flag accounts with a risk signal
- Tier accounts and fill in the territory worksheet

Output: three lists, one worksheet per salesperson

4 Week 4 · Act and review

- Start the Monday and Friday rhythm
- Make the Defend calls first
- Take one scorecard into one line review
- Count quotes, samples and meetings created

Output: first results, and a decision

The decision at day 30

By the end of the month you will know two things. One is whether the open cells are real, which your salespeople will tell you after the first dozen calls. The other is how much labor the method takes to keep current. If the first answer is yes and the second is "more than we have," you have a clear, specific case for tooling, and you know exactly what it needs to do.

Measure in month one
Quotes, samples and first meetings created on scored cells. Commission follows later, especially where a design cycle is involved.

Measure by month six
Lines per account at your top 50. New accounts opened. Accounts that moved from Defend back to Maintain.

Measure every year
Account penetration by principal, top-principal share and 30-day exposure.

A caution on expectations. This playbook doesn't promise a percentage. Results depend on how well your lines fit your accounts and how long your sales cycles run. What the method produces is a ranked list your team believes in.

CONCLUSION

The firm that knows its territory best

The rep model has always rested on knowing the territory better than a factory can from a distance. For most of its history, that knowledge lived in people. It still should. But the paper trail has caught up: every statement and POS file is a detailed account of who bought what, and most of it is read once and filed.

Five ideas to take back to your management team:

- **Reorganize by customer.** Your data arrives by principal. Your opportunity only shows up when the same customer is lined up across every line.
- **Read one grid three ways.** Open cells to expand, missing rows to acquire, shrinking cells to protect.
- **Score before you chase.** Fit × Access × Size turns hundreds of possibilities into a top 20.
- **Know your exposure.** Top-principal share, top-ten account share and 30-day exposure, every quarter.
- **Bring it to your principals.** Penetration and named open accounts change the tone of a line review.

None of it requires new software to start. It does require someone to do the matching, and to keep doing it.

relevate ai

See what revenue opportunities are hidden in your existing sales data.

Relevate AI is purpose-built for manufacturers' rep firms. It brings commission, POS, CRM and opportunity data into one trusted account view, surfaces cross-sell whitespace and at-risk revenue, identifies high-fit new accounts in your territory, and works alongside the CRM you already use. AI-powered. Human-approved.

See Relevate AI in Action

relevate.ai/rep-firm

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SOURCES AND NOTES

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Notes on this playbook

Sector scope of the statistics. The POS figures cited on pages 3 and 4 come from NEMRA's research in the electrical channel. The same study found that for most respondents POS applied to less than a fifth of sales,[5] and the weight of POS differs in electronics, plumbing, HVAC and industrial markets. Treat the numbers as indicators and check them against your own statements.

Illustrative material. The firm, accounts, scores, dollar amounts and dashboard in Figures 2, 4 and 5 and on pages 8, 11 and 14 are hypothetical. They are not customer results and not screenshots of any product. The exposure thresholds on page 10 are our suggested starting points, not an industry standard.

Not legal advice. Contract terms vary by agreement and by state. Have rep agreements reviewed by an attorney who works with rep firms.

Independence. MANA, ERA, NEMRA, AIM/R and the publications cited are referenced as sources. They did not sponsor, review or endorse this playbook.

About Relevate AI

Relevate AI is an AI data activation platform. Its Sales Hub is purpose-built for manufacturers' rep firms and component manufacturers, and turns sales and commercial data into prioritized opportunities, account intelligence and recommended next actions that people approve before anything happens. Learn more at relevate.ai/rep-firm.

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