AGR

AGR Inventory

Partner Enablement Toolkit

Equipping Partner Account Managers to Identify, Qualify, and Confidently Position AGR.

What Is Inside

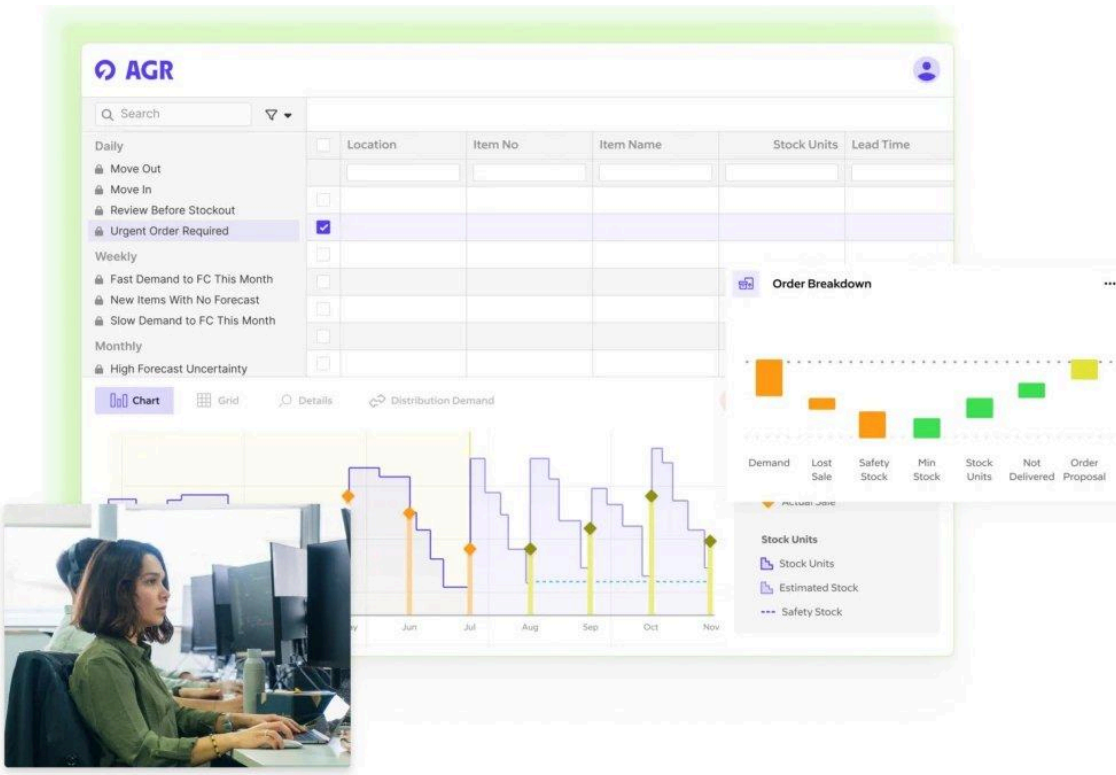
What AGR Actually Solves

AGR solves the core problems that most mid-market businesses silently suffer from. It replaces the guesswork and spreadsheet dependency that plagues inventory planning, giving their teams a clear, data-driven view of demand, stock risk, and supplier performance.

AGR tackles the costly double hit of excess stock and stockouts simultaneously, freeing up working capital while protecting service levels and product availability.

What makes it particularly powerful is that AGR does not stop at producing a forecast. It automates the entire replenishment cycle, factoring in supplier lead time volatility, container and order quantity optimisation, and custom ordering schedules, before pushing the finalised purchase order directly back into the ERP for transaction processing. No manual re-entry, no disconnected spreadsheets, no dropped balls.

Ultimately, AGR bridges the gap that ERP systems leave behind by adding true optimisation on top of transaction processing, allowing businesses to scale intelligently without increasing headcount, replacing tribal knowledge with structured, repeatable, and intelligent processes.



The Numbers That Back It Up

Metric	What It Means for the Business
Up to 30% stock reduction	Right-sized inventory levels free up significant working capital
Up to 80% planning time saved	Teams stop firefighting and focus on higher value activities. No more excel hell.
ROI in as little as 3 months	The investment pays for itself quickly through inventory savings alone
96% customer retention	Businesses that adopt AGR continue to use and grow with it
Zero re-keying	Approved orders flow directly back into the ERP automatically – reduced human errors
Scalable without headcount	Growing businesses manage greater complexity without adding planners

The Elevator Pitch

This is what your Account Managers should be able to say naturally in any customer conversation.

The One Liner

We work with a demand planning platform that typically reduces excess stock by up to 30% and frees up around 80% of planning time. AGR automates forecasting and replenishment end to end and pushes approved orders straight into your ERP.

Worth a 20-minute conversation to see if it fits?

The 60-Second Version

Open with the problem: Most businesses we speak to are still relying on spreadsheets, gut feel and a crystal ball to forecast and manage inventory. The result is cash tied up in the wrong stock, stockouts on key lines, and planners spending most of their week shackled to manual spreadsheets firefighting.

Introduce AGR: AGR is a demand planning and inventory optimisation platform that sits on top of your ERP. It forecasts demand automatically using best-fit algorithms per SKU per Location, then calculates dynamic safety stock based on your target service levels, and then pushes purchase orders straight back into your ERP. Automatically

Land the outcome: Businesses typically see up to 30% reduction in total stock value and free up around 80% of planning time. The team stops firefighting and starts making proactive, data-driven decisions.

Ask the question: Does that sound like a challenge your customers are currently dealing with?

up to **30%**
Less excess stock

up to **80%**
Less planning time

3–6 mo
Typical ROI

What Sets AGR Apart Technically

This section is for Account Managers who find themselves speaking with supply chain managers, operations directors, or planning teams who want to understand how AGR works under the bonnet. You do not need to become a product expert, but having enough depth to hold a credible conversation will make a significant difference.

The key message is this: AGR is not just a fancy reporting tool. It is an active optimisation engine that helps you make the right decisions, not just displays data. Every capability below is designed to remove a specific failure point in the traditional planning process.

AGR is prescriptive, its predicting your inventory position and then calculating the exact amount of safety stock per item per location required for you current and future position.

1. Forecasting Engine and Forecast Accuracy

Most inventory systems use a single forecasting method applied to every SKU regardless of how that item actually behaves. AGR takes a fundamentally different approach.

AGR's forecasting engine analyses the historical sales behaviour of each individual SKU and automatically selects the best-fit statistical algorithm for that item. This means a fast-moving, stable product gets a different forecast model to a seasonal item, a slow mover, or a product with high demand variability.

Forecast accuracy is continuously measured and monitored at SKU level. This means planners can see which items are forecasting well and which need attention, allowing them to focus their time where it actually matters rather than reviewing every line.

Feature	What It Does	Why It Matters to the Customer
Best-fit algorithm selection	Automatically chooses the most accurate statistical algorithm per SKU from multiple methods including trend, seasonal, and moving average models	No manual tuning required. Every item gets the right forecast model, not a one-size-fits-all approach
Forecast accuracy tracking	Measures actual versus forecast at item level on an ongoing basis	Planners know exactly where forecast error is highest and can prioritise their review effort accordingly
Seasonal and promotional handling	Identifies and models seasonal patterns, promotional uplifts, and demand spikes automatically	Businesses with seasonal ranges or promotional activity get accurate forecasts without manual adjustments for each event
New product forecasting	Handles new lines and product introductions where limited or no history exists	Businesses launching new products are not left guessing on initial stock levels

2. Dynamic Safety Stock Calculation

This is one of the most important and most overlooked capabilities in AGR, and one of the most powerful conversation starters with technically minded prospects.

The Problem Worth Highlighting

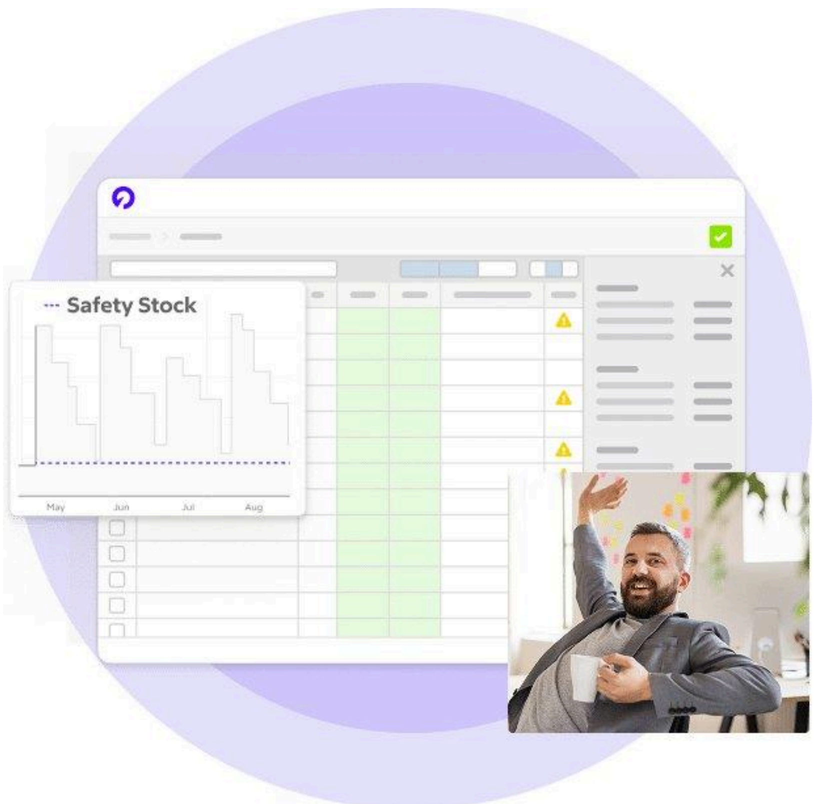
In the vast majority of businesses, safety stock figures were set manually when the ERP was first implemented, often years or even decades ago. They have never been reviewed. They bear no relationship to current demand variability, current lead time performance, or the service levels the business is actually trying to achieve.

The result is either too much stock everywhere, tying up working capital unnecessarily, or too little on the items that matter, causing stockouts.

AGR calculates safety stock dynamically. The key inputs are the target service level set by the planner for each item or category, combined with actual demand variability and actual supplier lead time variability. As those inputs change over time, the safety stock recalculates automatically – Every day.

This means businesses can make a deliberate, strategic decision about what service level they want to achieve for each product segment and let AGR calculate the stock required to deliver it. They are no longer guessing.

Feature	What It Does	Why It Matters to the Customer
Target service level as input	Planners set the desired service level per item, category, group or channel. AGR calculates the safety stock needed to hit that target	Businesses can differentiate service levels by product importance rather than applying a blanket rule to everything
Dynamic recalculation	Safety stock updates automatically as demand patterns and lead time variability change over time	No more static, outdated safety stock figures set at ERP implementation and never revisited
Demand variability factoring	AGR measures how much actual sales deviate from the forecast and factors this into the safety stock calculation	Items with unpredictable demand automatically carry more buffer stock. Stable items carry less. The system is self-calibrating
Lead time variability factoring	Actual supplier delivery performance is measured and used in the safety stock model	If a supplier consistently delivers late or inconsistently, AGR increases the buffer automatically to protect availability



3. Advanced ABC Analysis

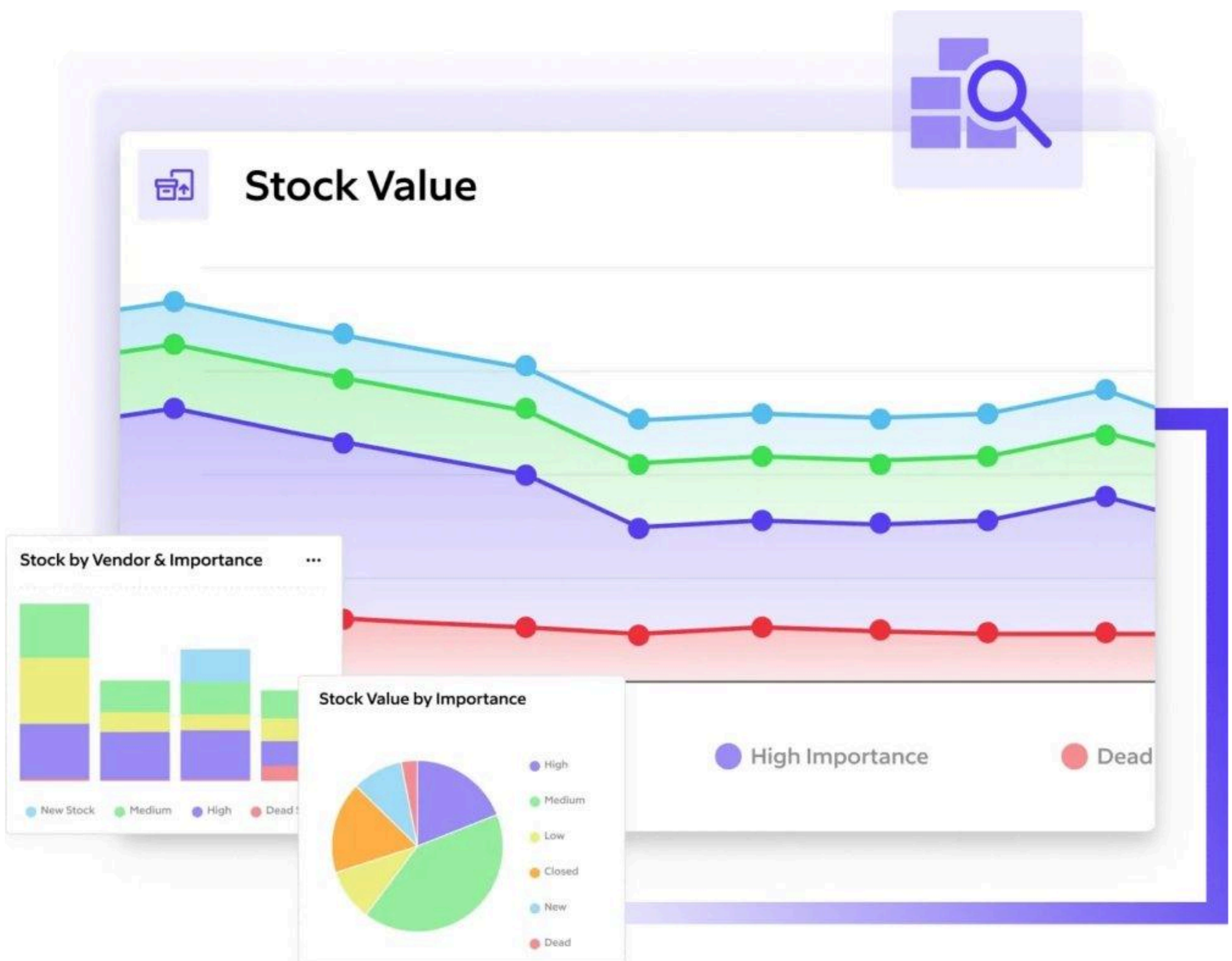
Standard ABC analysis ranks products by revenue or volume into three tiers. AGR goes significantly further with a multi-dimensional classification approach that gives planners a much more accurate picture of where to focus attention and how to differentiate replenishment strategies.

AGR allows businesses to segment their product range across multiple dimensions simultaneously, combining factors such as revenue contribution, sales volume, margin, demand frequency, and strategic importance. This creates a much richer segmentation that drives smarter inventory policies per group.

Feature	What It Does	Why It Matters to the Customer
Multi-dimensional ABC	Products are classified across multiple criteria simultaneously rather than a single revenue rank	Businesses can identify high-margin, low-volume items that deserve more protection, or high-volume, low-margin items where leanness is the priority
Policy-driven replenishment by segment	Different ABC segments can have different service level targets, safety stock policies, and review frequencies applied automatically	Planners stop treating all SKUs equally and start managing them intelligently based on their actual importance to the business
Automatic reclassification	As sales patterns change, product classifications update automatically	Seasonal items, growing lines, and declining products are automatically reclassified without manual intervention

Dimensions AGR can combine

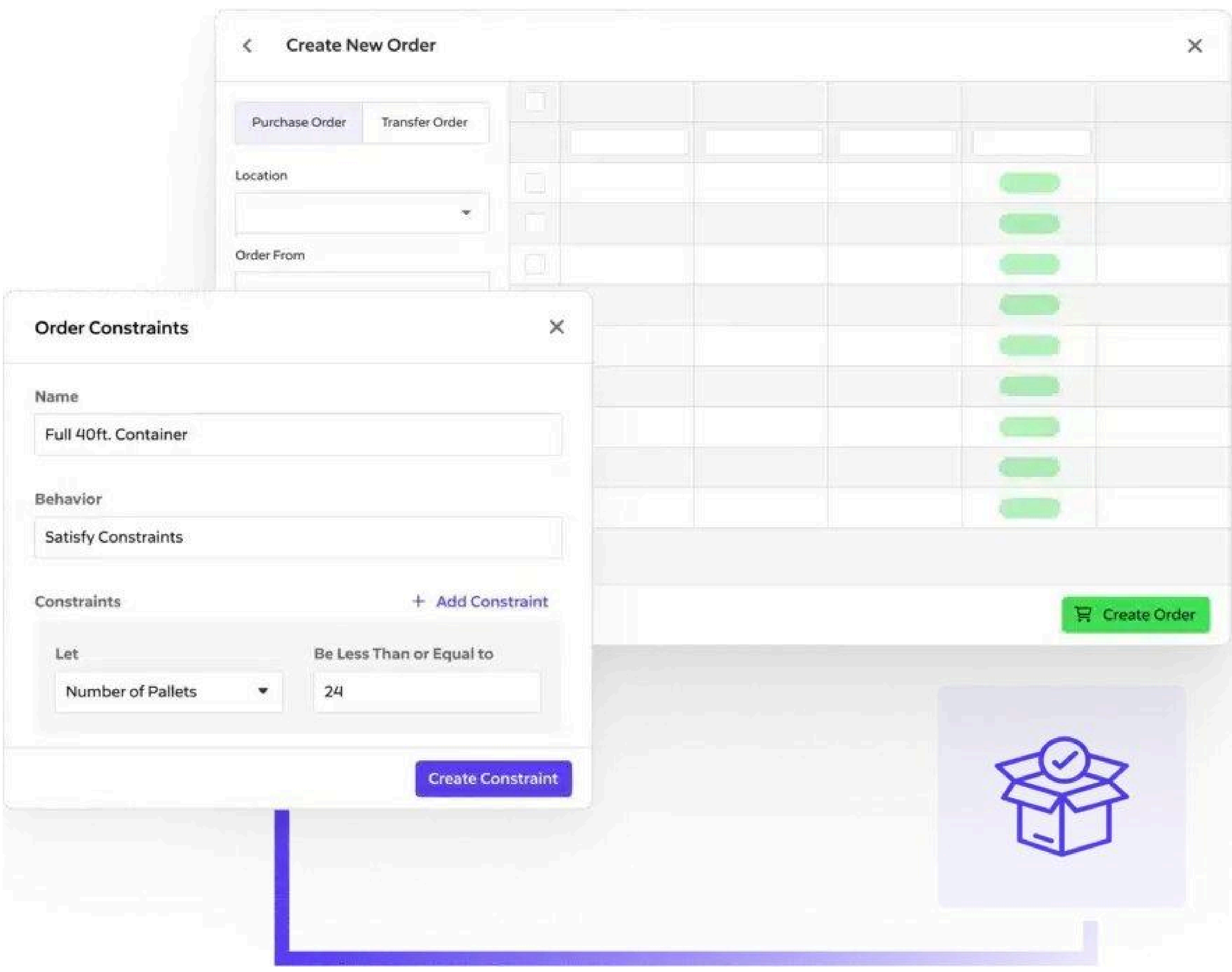
Revenue contribution · Sales volume · Margin · Demand frequency · Strategic importance



4. Order Optimisation and Replenishment Logic

Beyond the forecast and safety stock, AGR applies a sophisticated layer of ordering logic that reflects how businesses actually operate, not how a textbook says they should.

Feature	What It Does	Why It Matters to the Customer
Container and MOQ optimisation	AGR fills containers and respects supplier imposed constraints like minimum order quantities automatically when building order proposals	Businesses stop paying for half-empty containers and eliminate manual order rounding calculations
Custom order scheduling	Businesses can define which days orders are placed with which suppliers, and AGR plans accordingly – Set and forget	Order proposals align with real supplier relationships and internal workflows rather than theoretical optimal order points
Lead time volatility	Actual supplier lead time performance is tracked and built into replenishment timing	Orders are placed early enough to account for supplier variability, reducing the risk of stockouts caused by late deliveries
ERP write-back	Approved order proposals are automatically pushed back into the ERP as purchase orders	Zero manual re-entry. The planning system and the transaction system (ERP) are always in sync
Multi-location management	Stock can be planned and balanced across multiple warehouses or distribution centres	Businesses avoid situations where one location is overstocked while another runs out of the same item



5. Supplier Performance and Vendor Management

AGR includes integrated vendor management capabilities, giving businesses visibility into supplier performance alongside inventory planning.

Feature	What It Does	Why It Matters to the Customer
Vendor Card	A consolidated view of each supplier's performance data including delivery reliability and lead time consistency	Businesses can hold supplier conversations with data rather than anecdote, and make informed sourcing decisions
Lead Time Analysis	Tracks actual versus promised lead times per supplier over time	Planning teams can see which suppliers are reliable and which introduce risk, and adjust safety stock and order timing accordingly
Supplier comparison	Performance data allows side-by-side comparison of suppliers on consistent metrics	Procurement teams can renegotiate terms or switch suppliers based on evidence, not gut feel

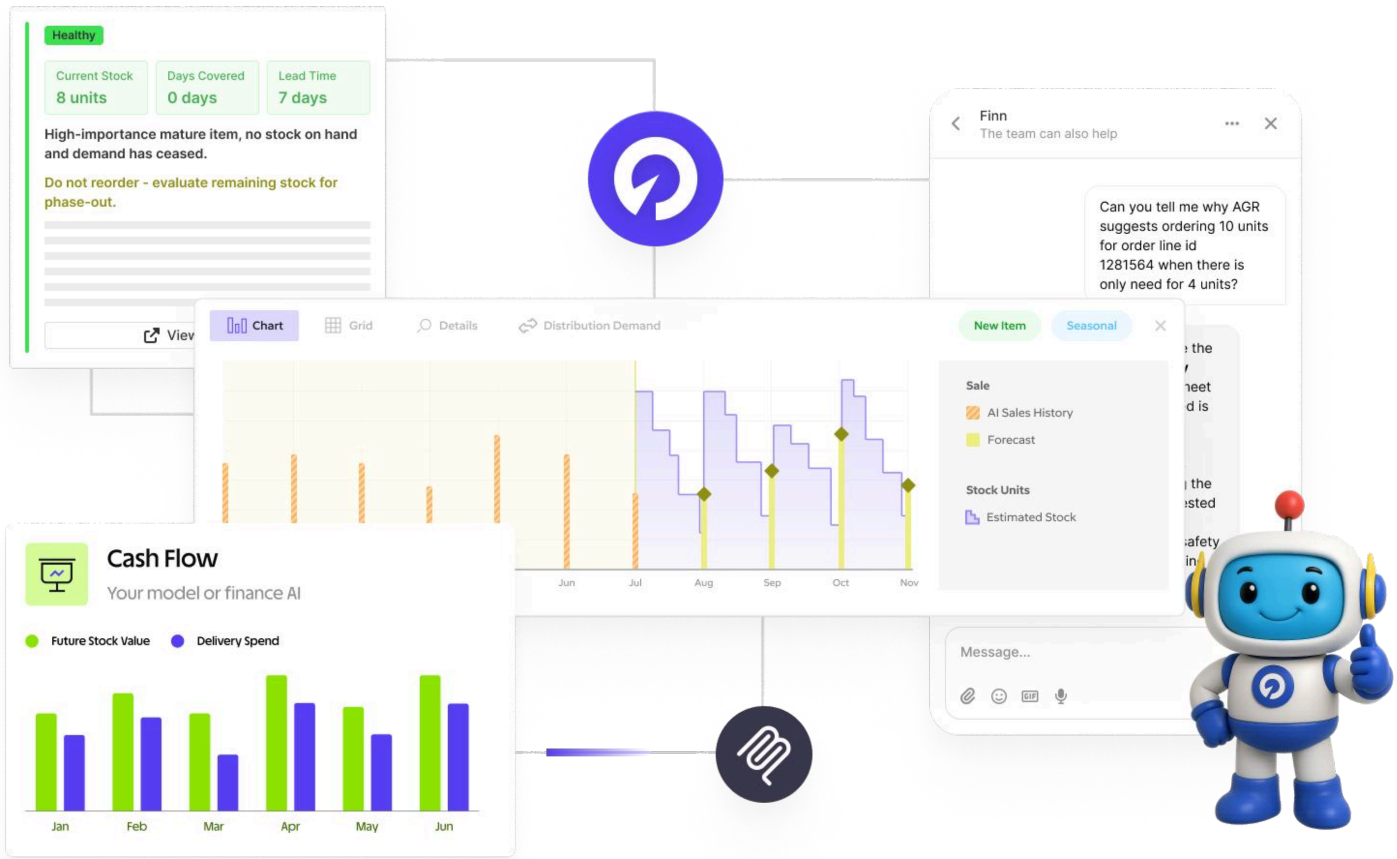
6. Reporting, Insights, and InsightsPro

AGR provides a full suite of operational reporting at item level, giving planners daily visibility of stock risk, demand changes, and replenishment requirements. For leadership teams, the InsightsPro module delivers executive-level reporting connected directly to operational data.

Feature	What It Does	Why It Matters to the Customer
Item-level insights	Every SKU has a dedicated item card showing forecast, stock position, order history, and risk flags	Planners can drill into any product instantly without building reports in Excel
InsightsPro	An advanced analytics module with executive dashboards, custom KPI builders, and PowerBI integration	Leadership teams get a real-time view of inventory health, service performance, and supply chain risk in one place
Supplier lead time dashboard	Built-in visibility of lead time variability and reliability per supplier	Planning decisions are informed by actual supplier behaviour, not assumed lead times
Computed Columns	Custom KPI fields that can be built and tracked directly within AGR reports	Businesses can track the metrics that matter to them specifically, not just the ones the software ships with

7. AI Inventory Management

AGR's AI inventory management gives every planner a head start: a forecast from day one, instant analysis on every item, and an assistant that gives straight answers on demand. The same AGR data can power your other tools too, including finance models, BI dashboards, and your own AI agents.



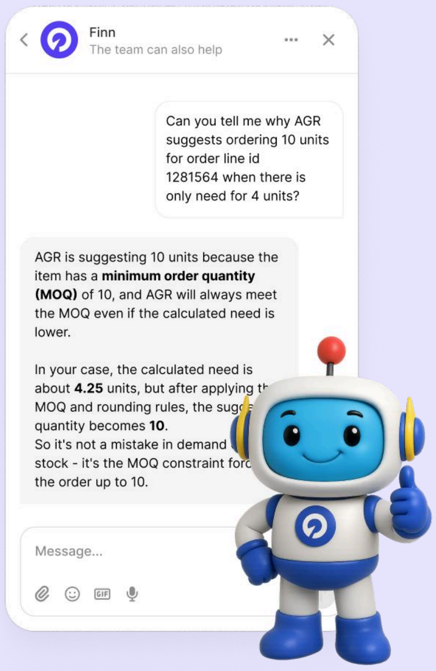
AI-Powered Forecasting

A forecast is only as good as the data and method behind it. AGR puts AI to work on both, cleaning the history, filling it in where it's thin, and matching each item to the model that actually fits its pattern. Planners stay in charge, with more time for the decisions that matter.

Feature	What It Does	Why It Matters to the Customer
AI-Generated Sales History	Reads a new or sparse-history item's attributes, finds the closest matches already in the catalogue, and blends their patterns into a forecast you can act on from day one. Works for one item or in bulk, no configuration needed.	New product launches are not left guessing on initial stock levels. The forecast automatically switches to a standard, data-driven forecast once real sales history builds up.
AI Item Analyser	Reviews an item's stockout risk, safety-stock health, and vendor delay exposure, and returns the risk in plain language along with what's driving it and the action worth taking. Refreshed on demand.	Exceptions get managed, not missed. Planners get a concise read on any item in seconds instead of building a report.

Finn, AGR's AI Inventory Management Assistant

Finn is the conversational assistant built into AGR. Ask a question from any screen and get an answer grounded in your inventory, forecasts, and orders, with the reasoning shown. No SQL. No report builds.



Feature	What It Does	Why It Matters to the Customer
Grounded in your data	Finn only works from what's in your system, not the public internet.	Answers can be trusted because they come from the customer's own inventory, forecast, and order data, not a generic model guess.
Works across all of AGR	Finn spans inventory, orders, forecasts, and supplier performance in one place.	One assistant, not five separate reports pieced together.
Secure by design	Data stays inside AGR, built on the same security model as the rest of the platform.	No new security review needed to adopt it, and nothing is sent to a public LLM.

Open AI Access: AGR MCP Server

Give your AI agents direct access to AGR. Through a single MCP server, your Claude, GPT, or in-house agent can query inventory, forecasts, and exceptions natively. No custom integration needed.

Feature	What It Does	Why It Matters to the Customer
AGR MCP Server	AI copilots and internal agents query AGR's inventory, forecast, and exception data directly. BI and orchestration tools can pull live forecast data the same way.	IT teams don't need a bespoke integration project to plug AGR into whatever AI tooling they're already using.
Discoverable, not bespoke	Any MCP-compatible assistant, Claude, GPT, or an internal agent, can query forecasts, stock levels, and exceptions without a custom integration project.	Faster time-to-value for AI initiatives already underway elsewhere in the business.

Discovery Question Sheet

Account Managers do not need to be inventory experts. They just need to ask the right questions during routine account reviews. The following questions are designed to surface pain naturally without sounding like a pitch.

If a customer answers yes to two or more of these, there is very likely a strong AGR opportunity worth flagging.

Planning and Forecasting

Question 1	How does your team currently manage replenishment planning? Are they still heavily reliant on spreadsheets or manual processes?
Question 2	How confident is the team in the accuracy of your demand forecasts, particularly across seasonal or promotional periods? Are they still forecasting in Spreadsheets?
Question 3	How much time would you estimate your planners spend each week on routine ordering tasks versus strategic analysis?

Safety Stock and Service Levels

Question 4	Do you know what service levels you are currently achieving per product or per category? Is that being tracked?
Question 5	When were your safety stock levels last reviewed? Are they still based on figures set during your ERP implementation? Do you have static min/max levels set in your ERP?
Question 6	Do you have a way to set different service level targets for your most important products versus your slower movers?

Stock and Working Capital

Question 7	Do you find yourselves carrying too much of the wrong stock while running out of your fastest-moving lines?
Question 8	Has excess inventory ever been flagged as a concern by finance or leadership in terms of working capital pressure?
Question 9	How do you currently handle slow-moving or obsolete stock? Is it a growing problem?

ERP and Systems

Question 10	What ERP system are you running? Do you feel it gives you enough visibility over stock risk and demand?
Question 11	Are your planners having to re-enter or reconcile data between systems when placing orders?
Question 12	Have you looked at adding a demand planning layer on top of your ERP, or has that conversation come up internally?

Supplier Performance

Question 13	How do you currently track supplier delivery performance? Is that data easy to access and act on?
Question 14	Do your planners factor in supplier lead time variability when placing orders, or do they use a fixed lead time assumption?

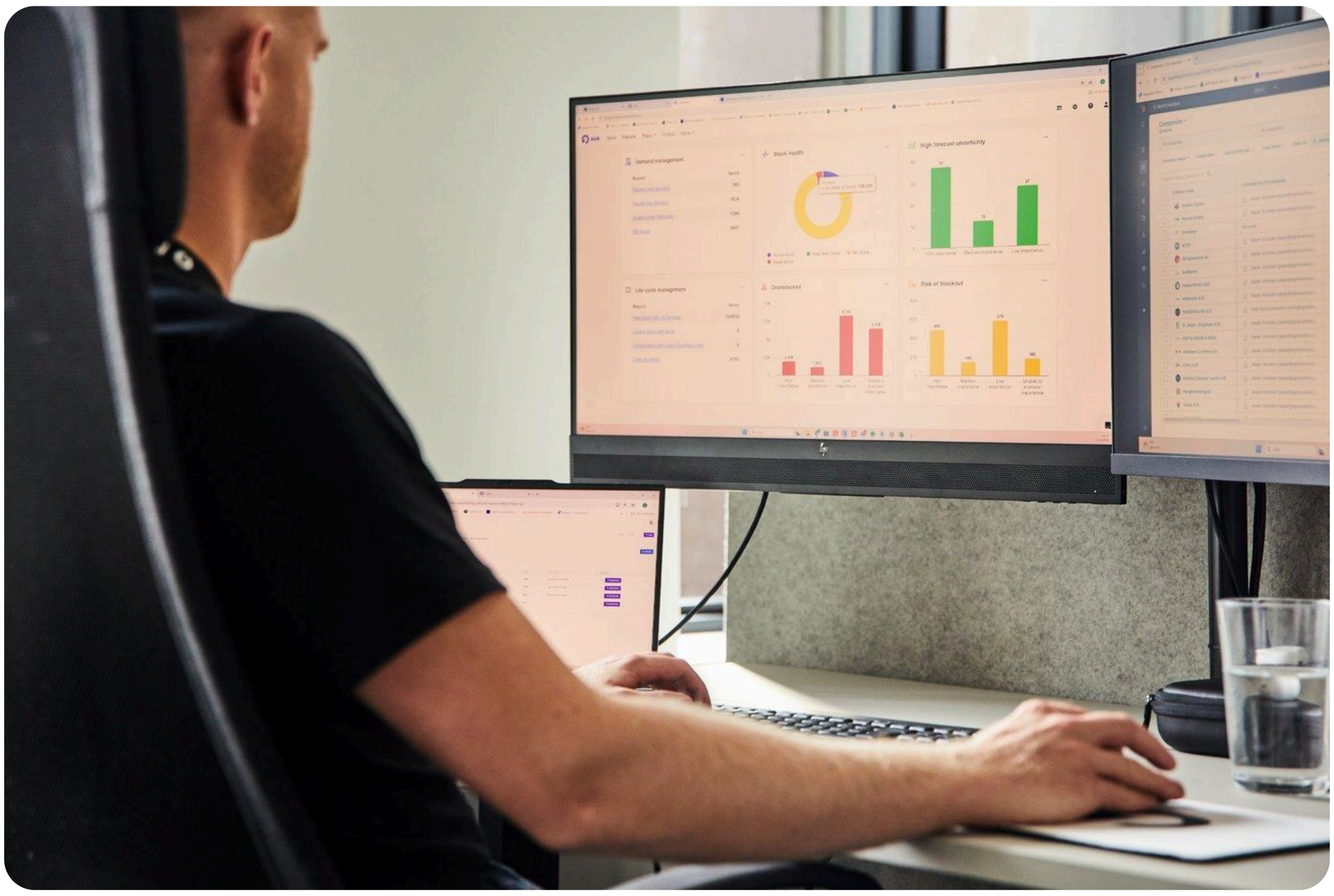
Discovery Questions

Growth and Capacity

Question 15	As the business grows, how are you planning to scale the planning function? Are you looking to add headcount?
Question 16	Is there a specific initiative such as a new product range, a new market, or a warehouse consolidation where better inventory visibility would make a real difference?

Qualifying Signal

If a customer mentions spreadsheets, static min/max levels, outdated safety stock, stockouts, excess stock, planners don’t have capacity, ERP limitations, or unreliable suppliers in the same conversation, treat this as a warm lead. Flag it immediately for an AGR-led discovery call.



The Referral Email Template

Use this email after a conversation where inventory pain has surfaced. Keep it short, warm, and focused on outcomes. Personalise the section in brackets before sending.

Subject: Thought This Might Be Worth 20 Minutes of Your Time

Hi [First Name],

Great speaking with you recently. Following on from our conversation about [mention the specific pain point, e.g. the time your team spends on replenishment planning / the excess stock challenge / the safety stock figures that have not been reviewed in years], I wanted to share something that I think could be genuinely relevant.

We work closely with AGR, a demand planning and inventory optimisation platform that sits on top of your existing ERP. It forecasts demand automatically using best-fit algorithms per SKU, calculates dynamic safety stock based on the service levels you actually want to achieve, and then pushes approved purchase orders directly back into your system. No manual re-entry, no spreadsheet juggling.

The results businesses typically see:

- Up to 30% reduction in total inventory value
- Up to 80% saving in planning time
- Improved service levels driven by dynamic, target-based safety stock
- ROI typically achieved within 3 to 6 months

Would it be worth a 20-minute call to explore whether it could add value for [Company Name]? I am happy to make the introduction.

Best regards,
[Your Name]

Opportunity Spotter Card

This is a quick reference guide to help Account Managers recognise the signs of a strong AGR opportunity during normal account activity. If you hear or see any of these signals, flag the account for follow up.

1. Red Flags to Listen For

Trigger Area	Phrases That Signal an Opportunity
Planning	"We manage replenishment in Excel" / "Our planners are always firefighting" / "We struggle with forecasting"
Safety stock	"Our safety stock and min/max levels was set years ago" / "We have no idea if our safety stock is right" / "We just use a fixed number of weeks cover"
Service levels	"We don't really track service levels" / "We know we have stockouts but can't see it easily" / "Availability is a constant issue"
Stock levels	"We have too much stock but still run out of things" / "Our warehouse is full but availability is poor" / "Finance keeps asking us about working capital tied up in excess stock"
ERP limitations	"Our ERP tells us what happened, not what to do next" / "We calculate order quantities manually" / "We're on SAP / Sage / Dynamics / NetSuite but it doesn't do planning"
Supplier issues	"We never know when stock is actually going to arrive" / "Lead times keep changing and we can't keep up" / "We have no visibility of supplier reliability"
Headcount pressure	"We would need to hire more planners to cope" / "We can't scale without adding resource" / "The team is stretched thin"
Growth or change	"We are launching a new product range" / "We are consolidating warehouses" / "We are expanding into new markets"

2. The Ideal AGR Customer Profile

Characteristic	Detail
Company size	Mid-market businesses, typically 20 to 500 employees
Industries	Wholesale, Distribution, Retail, health and beauty, food and beverage, manufacturing
ERP systems	SAP, Sage, Microsoft Dynamics, NetSuite, Epicor, Infor, and other major ERP platforms
Planning maturity	Currently using spreadsheets or basic ERP functionality for demand planning
Key roles	Supply chain managers, inventory planners, operations directors, finance directors
Buying trigger	Growth pressure, cash flow concerns, service level problems, outdated safety stock, or a new ERP implementation

How to Flag an Opportunity

If you identify a strong signal, contact your AGR partner manager directly with the account name, the pain points discussed, and the key contact. AGR will take it from there and keep you informed throughout the process.

Objection Handling Pocket Guide

These are the most common responses Account Managers encounter when introducing AGR. Use these to keep the conversation open and move towards a discovery call.

“We already have that in our ERP.”

Suggested Response

That is a common one, and it makes sense on the surface. Most ERP systems are brilliant at processing transactions, but they are not designed to optimise inventory. ERP holds a fixed lead time and a static safety stock figure that was probably set during implementation and has never been reviewed. AGR sits on top and does the demand planning and optimisation work that ERP simply was not built for, then pushes the result back in so your team gets the best of both worlds.

“We have safety stock set up in our ERP already.”

Suggested Response

That is exactly the conversation worth having. In most businesses we speak to, those safety stock figures were set when the ERP went live and have never been updated. They are not based on current demand variability, current supplier lead time performance, or any target service level. AGR calculates safety stock dynamically based on the service levels you actually want to achieve, and recalculates automatically as conditions change. It is a fundamentally different approach.

“We tried something like this before and it didn't work.”

Suggested Response

That is really useful context. A lot of the customers we speak to have had similar experiences with tools that were too complex, too rigid, or not well supported post-implementation. AGR is built specifically for mid-market businesses and is designed to fit around how you actually operate. It would be worth 20 minutes to see how it compares to what you tried before.

“We don't have the budget for this right now.”

Suggested Response

That is completely understandable. The businesses we typically work with find that the reduction in excess stock alone more than funds the investment. Most customers see ROI within 3 to 6 months, often from working capital released through right-sized inventory. It might be worth a conversation to understand what the numbers could look like specifically for your business.

“Our team manages this fine with spreadsheets.”

Suggested Response

Many of our customers said the same thing before they made the switch. The question is not whether spreadsheets work, it is whether they scale and whether they are giving you the right answer. Spreadsheets cannot dynamically recalculate safety stock, cannot apply different forecast models per SKU, and cannot push orders back into the ERP automatically. Most planning teams using AGR free up around 80 percent of their time, which means the same team can manage significantly more complexity without burning out.

“I'm not the right person to speak to about this.”

Suggested Response

No problem at all. Who in the business would typically own inventory planning or supply chain decisions? I would be happy to make a direct introduction if that would make it easier.

Customer Proof Points

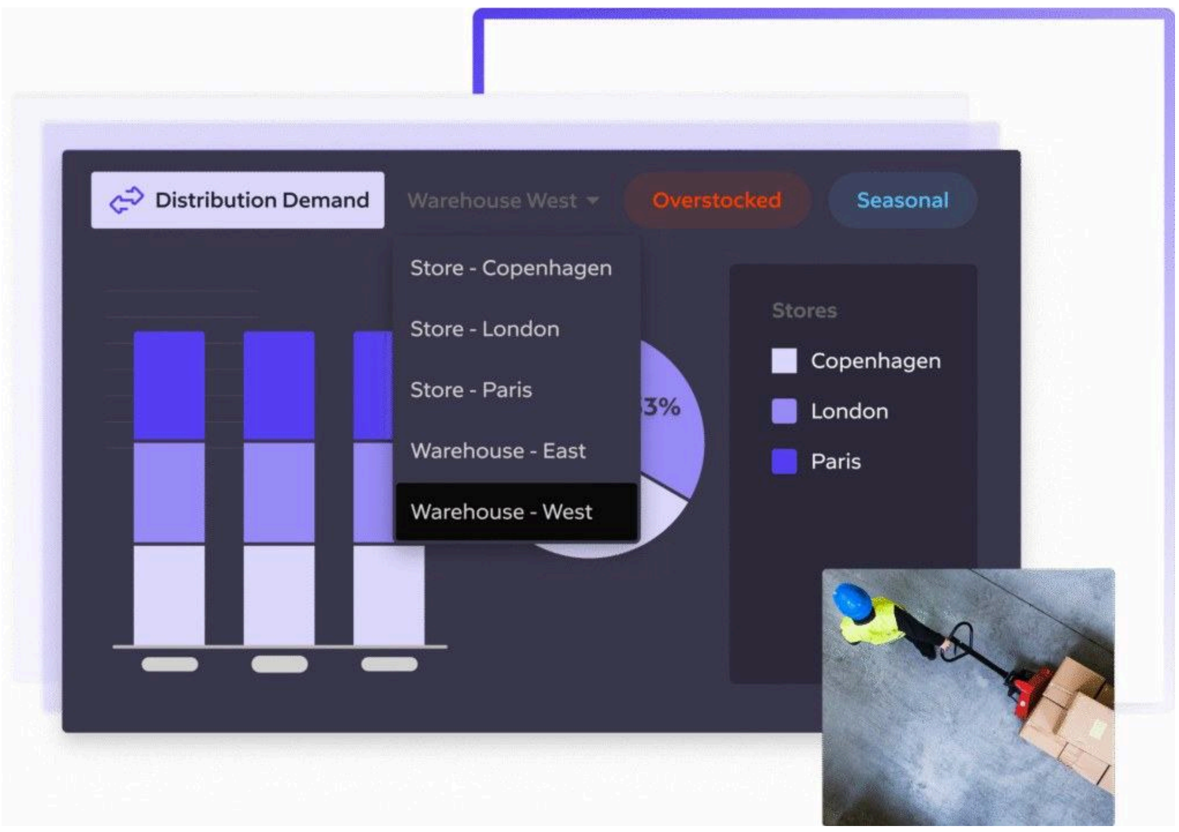
Use these anonymised examples to add credibility quickly in conversation. They demonstrate that AGR delivers real, measurable outcomes across a range of industries.

https://www.agrinventory.com/cases/

Industry	What They Achieved	Key Benefit
Distribution	A mid-market distributor carrying over 5,000 SKUs reduced total inventory value by 28 percent within 12 months while improving product availability across their top-selling lines. Dynamic safety stock replaced static ERP figures that had not been reviewed in over five years.	Inventory reduction, improved availability, and safety stock modernisation
Manufacturing	A manufacturer with strong seasonal demand patterns freed up 75 percent of planning time by automating their replenishment cycle, allowing the team to focus on new product introductions and S&OP rather than routine ordering.	Planning efficiency and capacity to grow without adding headcount
Health and Beauty	A health and beauty business struggling with cash flow used AGR to right-size stock across three warehouses, releasing significant working capital without impacting availability. Target service levels were set per product segment for the first time.	Working capital release, multi-site visibility, and service level differentiation by segment
Wholesale	A wholesale distributor eliminated manual order re-entry entirely by connecting AGR directly to their ERP, saving hours of admin weekly and removing a consistent source of ordering errors.	ERP integration, zero re-keying, and operational efficiency
Retail	A retail business used AGR's advanced ABC analysis and GMROI reporting to identify underperforming ranges, resulting in a significant reduction in obsolete stock and a sharper focus on high-margin, high-turnover lines.	Range rationalisation, reduced obsolescence, and improved margin performance

A Note on Proof Points

These examples are intentionally anonymised for partner use. If a customer asks for specific case studies or references, contact your AGR partner manager who can provide more detailed customer stories appropriate for the conversation.



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Partner Use Only

Flag it with your AGR partner manager.

Contact your AGR partner manager with the account name, the pain points discussed, and the key contact. AGR will take it from there and keep you informed throughout the process.

Make an introduction →