



**TRACTOR
ZOOM**

Kubota Kaizen Excellence Program:

APPLYING SUBSIDY FUNDS TO TRACTOR ZOOM



What are Kaizen Funds?

The Kubota Kaizen Excellence Program (KEP) provides subsidy dollars that dealers can apply toward investments in tools, training, or services that improve their KEP metrics.

Each application is evaluated on a case-by-case basis, approval depends on the dealer demonstrating that the investment will improve one or more of the 18 KEP metrics across:

- Profitability
- Performance
- Customer Satisfaction
- Facilities Appeal



Tractor Zoom's implementation fees have been confirmed as eligible for KEP subsidy consideration.

What Tractor Zoom Fees May Qualify

KEP subsidy funding applies to one-time fees — specifically, initial implementation costs for new Tractor Zoom services. These services are necessary for the solutions to become functional.

What to look out for in your Tractor Zoom Statement of Work:

Statement of Work (SOW)

Tractor Zoom Professional Services - One-Time Fee

TRACTOR ZOOM
JUMP START SERVICES

Phase I

Implementation and Training -
Anticipated delivery date of
[Month Day, Year]

When operational, the software will help dealers move toward excellence in the pillars and metrics defined below, by product.

- Setup of technology infrastructure
- Setup of default dashboards and kanban boards for Visual Pipeline Manager & Order to Cash
- Setup and documentation of workflow for sales and management teams
- Initial ingest of data associated with Customer's DMS platform (Accounts, Contacts, Inventory, and History)
- Initial setup of Anvil Pro quoting
- Initial setup of user group hierarchy (i.e. applying permissions & restrictions)
- Includes project plan development, recurring project status meetings and recurring project status reports
- Training online with Customer
- Anticipated "go live" date of [Month Day, Year]



Tractor Zoom Pro (TZP) Valuation & Sales Workflow

Tractor Zoom Pro gives dealers data-backed appraisal tools, comparable sales matching, and automated repricing for used inventory.

Sales teams can complete a full equipment appraisal in approximately five minutes, and the platform's AI layer actively monitors inventory age and flags units that need attention to move.

The result is tighter margin protection on trades, faster deal-to-invoice cycles, and healthier inventory turnover.

Pillar 1: Profitability

Gross Margin %

Appraisal accuracy and pricing discipline protect margin on used equipment trades

Sales Absorption Rate %

Tighter used equipment margins improve the ratio of equipment margin to SG&A costs

Absorption Rate %

Faster deal settlement accelerates cash flow, supporting parts/service margin coverage of indirect costs

Current Inventory %

AI-driven inventory monitoring helps dealers identify and move aging units, keeping inventory fresh



Anvil Pro CRM & Sales Workflow

Anvil Pro is a CRM and sales workflow platform built for ag equipment dealers.

It ingests leads, routes them through a defined sales process, and connects activity across the sales, parts, and service departments.

The platform is designed to reduce leads lost to poor follow-up, shorten time-to-close, and create a more consistent customer experience across the dealership.

Pillar 2: Performance

Market Share: Entity-In

Structured lead workflow and faster sales processing support higher unit conversion rates within the dealer's local market.

Wholesale Sales Dollar Volume

Improved pipeline management and deal velocity contribute to higher total sales output.

Pillar 3: Customer Satisfaction

CSI

A consistent, connected sales and service experience across departments drives higher customer satisfaction scores.

Net Promoter Score - Sales

Faster, more organized sales interactions improve the likelihood of customers recommending the dealership.

Net Promoter Score - Parts / Service

Cross-department workflow integration supports consistent parts and service experiences (*impact is strongest when Anvil Pro is deployed across all departments).

Combined TZP & Anvil Implementation

Dealers implementing both platforms benefit from an integrated selling solution:

TZP handles valuation and inventory intelligence; Anvil Pro handles pipeline and customer workflow. Together they address metrics across three of the four KEP pillars.

Pillar 1: Profitability

- Gross Margin %
- Absorption Rate %
- Sales Absorption Rate %
- Current Inventory %

Pillar 2: Performance

- Market Share – Entity-in
- Wholesale Sales Dollar Volume

Pillar 3: Customer Satisfaction

- CSI
- NPS – Sales
- NPS – Parts*
- NPS – Service*

*Parts and Service NPS impact is strongest when Anvil Pro is deployed across those departments, not sales only.

Note:

Ongoing subscription fees are not eligible.

The KEP subsidy applies to initial one-time implementation fees only. Each submission is reviewed individually by Kubota Dealer Development.

How To Apply

1

Apply as early as possible.

Kubota recommends submitting for fund allocation before or as soon as you begin conversations about implementing a new service. There's no downside to applying early, even if the project isn't finalized yet.

2

Submit through Kubotalink.

Log in to Kubotalink and navigate to the Dealer Development tab to submit your KEP fund request.

3

Include supporting documentation.

Your submission should include:

- A quote from Tractor Zoom for the initial implementation fee
- Supporting materials explaining how the service improves your KEP metrics (your Tractor Zoom rep can help with this)

4

Receive approval from Dealer Development.

Casey Quigg (Sr. Manager, Dealer Development) and his team review submissions. Approval is based on demonstrated connection to KEP metric improvement.

5

Return proof of purchase after going live.

Once you've signed your contract and received your invoice from Tractor Zoom, submit those documents to complete the reimbursement request.

6

Receive reimbursement.

Kubota processes reimbursements via ACH payment, generally within two to three weeks of proof of purchase submission.

What To Expect

- Reimbursement is up to 50% of eligible one-time fees, subject to Kubota's KEP policy and approval
- Reimbursement is per dealership location
- Only initial implementation fees qualify — not recurring subscription costs
- Submissions are evaluated case-by-case; approval is not guaranteed



Questions?

On the application process:

Kubota Dealer Development:
ktc_g.kep@kubota.com

Or contact your Division Office
Business Systems Trainer

On Tractor Zoom pricing and implementation:

Jeremy Hewitt,
VP Business Development
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Information in this guide is based on KEP Program Guidelines (Version 1.2, November 2025) and direct guidance from Kubota Dealer Development.

All fund applications are subject to Kubota's KEP subsidy policy.

Tractor Zoom does not administer KEP funds.