



Repconnect

Company Update

June 30, 2026



Introduction



Iram Mostofa
Marketing Support Coordinator

Meeting Notes

Important information before we begin

- Thank you for joining us!
- This meeting is being recorded
- On-demand playback will be available
- Next Meeting in the start of Q4

Our Agenda

Today

- **Sales Update | 30 minutes**
 - C&I | **John Walker**
 - Utility | **Jim Watters**
 - Sales Operations | **DeAnna Jones**
 - Pricing | **Rustin Reagin**
- **Rep Support | 15 minutes**
 - Marketing | **Iram Mostofa**
 - Training | **Leigh Wolfe**



Sales – Commercial and Industrial



John Walker
Regional Sales Manager, Sales Distribution C&I

Current Production Lead Times



Revised 4/17/2026

	Cable Product Line	Lead Time (ARO)
C&I < 6AWG	We are unable to quote LV cables at this time.	N/A
Power > 8AWG	Series C - LV Power [E3]	stock to 16 weeks
	Series F - Bare Copper [E6]	stock to 11 weeks
	Series S - LV Power Singles [E5]	stock to 8 weeks
	Series G - MV-105 (Copper) [E8]	stock to 39 weeks
	Series G - MV-105 (Aluminum) [E8]	stock to 39 weeks
	3/C Series G - MV-105 [E8]	stock to 42 weeks
	Series U - MV URD (TR-XLPE) [E9]	stock to 39 weeks
	Series U - MV URD (TR-XLPE) / 35kV 750MCM and larger [E9]	stock to 42 weeks
	Series U - MV URD (EPR) [E9]	stock to 39 weeks
	Series U - MV URD (EPR) / 35kV 750MCM and larger [E9]	stock to 42 weeks
	Series C Armor (MC, AIA) [E3]	stock to 52 weeks
	Series G Armor (MC, AIA) [E8]	stock to 52 weeks

Highlighted sections indicates a change in lead time from previous issue.



Sales – Utility



Jim Watters
Director of Sales, Utility

Q2 2026 Update

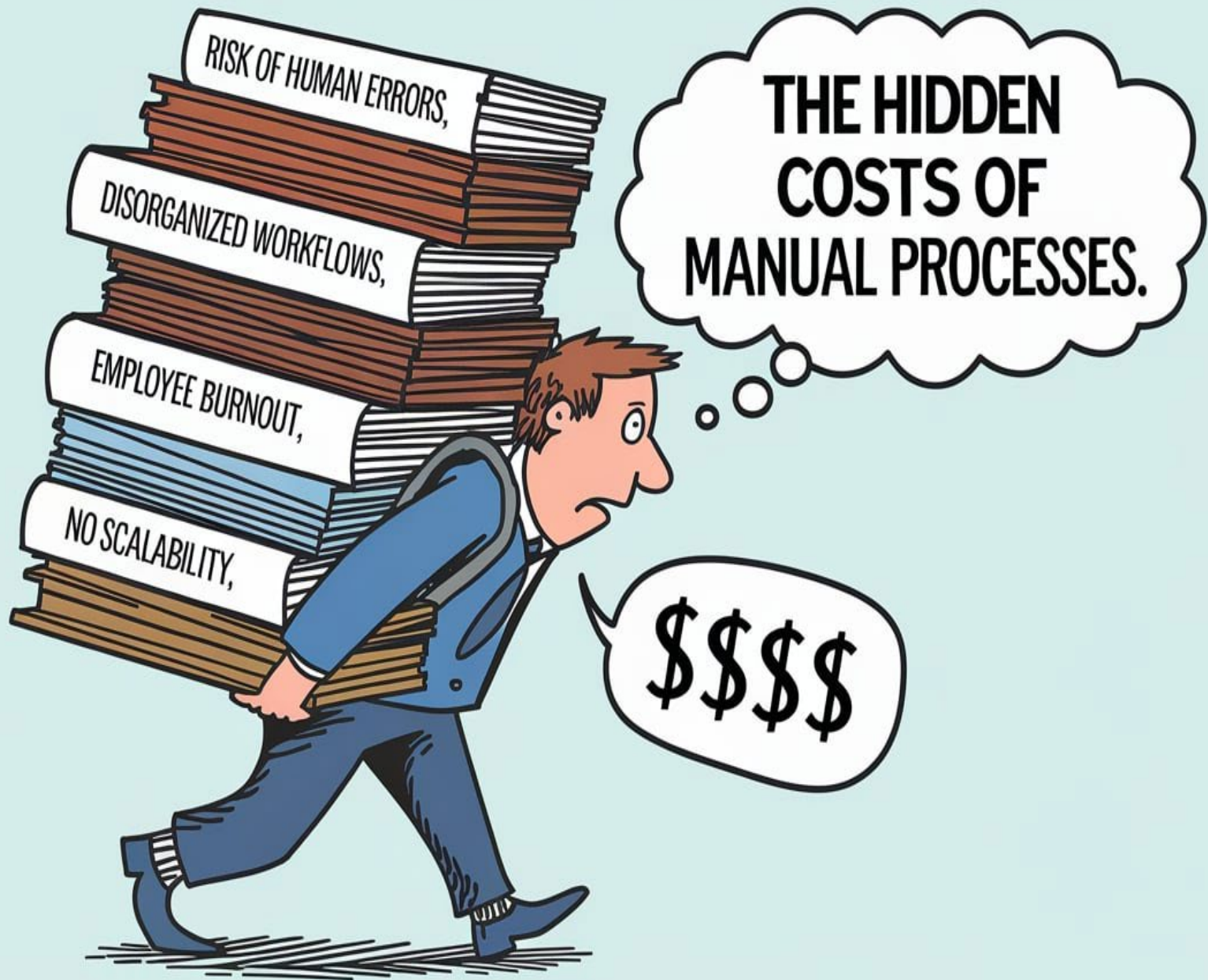
- 2026 Tradeshows:
 - Complete: DTECH, TechAdvantage, NWPPA, IEEE PES T&D, ICC Spring, USMA, TEMA
 - Upcoming: UPMG (Sept), GREMMA (Oct), ICC Fall
 - Recommendations for 2027?
 - Southeast Electrical Exchange, NCAMES, other regional conferences, open houses?
- Rep strategy & tactical (target) meetings
 - Wrapping up round 1 of discussions (except CA, NV, AZ & HI)
 - Will send out final target customer spreadsheets in July.
 - Targeted approach to IOU & public power / municipal utility approvals based on LS Cable's capabilities & end user expectations.
 - LS Cable will need to double utility business in 2027 to coincide with new capacity.
- What's in the pipeline?
 - Finalized two year VIP (Volume Incentive Program) with Irby Utilities!
 - Challenge: Each rep to book at least 1 x \$1M contract (direct or thru dist) for 2027!
 - Closing in on Avangrid, Southern Company, TECO, Oncor, FirstEnergy, & Entergy!



Sales Operations



DeAnna Jones
Sales Operations Manager



The Challenge

- Concern that upcoming capacity expansion over the next two years current sales operations team cannot absorb an increase in workload without changes to structure or process
- Optimizing the team's capacity will require a combination of automation, strategic hiring, targeted training, and process refinement
- Relying on a few seasoned employees to keep everything running
 - This is the danger of '*tribal knowledge*' where critical information lives in personal files and people's heads and when they leave, so does operational knowledge
 - '*Once those guys are gone, we won't know what to do.*'

Strategic Action Plan

■ Automation of Manual Tasks

- Explore enhancing the portal's inventory lookup features to reduce reliance on static reports and improve user experience (UX)
 - Review of portal and SAP sales operations processes with consultant in May
- Prioritized list to complete as noted below:
 - "Send E-Mail" to uncheck by default in SAP Order confirmation screen (Acknowledgement) - **Complete**
 - Tolerance plus and minus 2 percent – **In process**
 - Enlarge/summarize comment section on the Sales Acknowledgement to the last page - **Complete**
 - Order Tracking – BOL/Packing Slip to be able to print in .pdf
 - Cut Spread Sheet be able to import to SAP – **On deck**
 - Acknowledgement send by contact in the Dealer Portal - **Complete**
 - Pro-Forma Invoices turn on in SAP

■ Team Structural Alignment

- Create more bandwidth for team to focus on higher-value activities and prepare team to handle increased business volume efficiently to ensure sustainable growth and operational excellence
 - Brian Booth – new Account Manager has assumed full account responsibility

■ Process and Workflow Improvements

- Encourage the use of existing tools and explore additional functionalities within SAP and the portal to further optimize workflows
 - Make more information and tools accessible directly to reps and customers via web portal, reducing internal manual tasks and improving user experience
 - On-line access to CTRs and LTL tracking numbers; Reel Helper tool for reel size and cut length information

Strategic Action Plan – Process and workflow improvements

■ Issue: Managing orders without cut lengths

- Can delay order entry as spreadsheets are presented without much delineation so it is difficult to decipher
 - Since they are not simplified and neatly organized it can be harder to track
 - Can take up valuable time and resources to arrange internally
- Can delay production as they are given days, sometimes weeks after initial PO was generated
- Contractor takeoff spreadsheets that do not have final or accurate information
 - Total Quantity doesn't match at times
 - The cuts sometimes get adjusted

■ Action Plan

- Most accurate up to date cuts
 - We need final cuts to prevent delays at production
- Reel markings need to be clear
 - Reel Markings can be extensive, but the sales acknowledgement will only show the first line
 - Written out in full in one column on the spreadsheet (example below)
- Prior to sending to LS Total Quantity needs to be double checked for accuracy

Reel Marking

Reference Loenbro Takeoff PO#418517 Reel: XFMR-HSE-01 Data Hall 1100
Reference Loenbro Takeoff PO#418517 Reel: XFMR-F125p Data Hall 1100
Reference Loenbro Takeoff PO#418517 Reel: XFMR-F125p Data Hall 1100

Strategic Action Plan – Process and workflow improvements

▪ Action Plan

- To expedite and streamline the process we need the spreadsheets cleaned up and trimmed to make order entry more efficient
 - Take out unnecessary columns
 - Consider adding a column for Sales Acknowledgement number association (example below)
- Inside sales requests that the spreadsheets be modified for optimal entry efficiency by the RSMs or Reps
 - Will cut down on the amount of time spent arranging the spreadsheet for better tracking
 - Will ensure the order is entered timely and without errors / rework
- Weighing options for capacity planning visibility if cuts are not available at when purchase order is issued

SAP #	Sales Ack #	
100	1	
110	2	
120	3	
130	4	
140	5	
150	6	

Strategic Action Plan – HubSpot CRM Integration

- Marketing team has been using HubSpot to manage internal and external outreach for a few years
- Sales team starting to integrate daily engagement activities into HubSpot



Strategic Action Plan – HubSpot CRM Integration

■ ‘Gather, Retain and Share’

- Lead visibility and ownership
 - Shared visibility across teams
- Activity tracking and accountability
 - Log calls, e-mails and meetings
 - Better collaboration and coordination
 - “If it’s not in HubSpot, it didn’t happen”
- Pipeline transparency and forecasting
 - Import quote data from spreadsheet to HubSpot
 - Better visibility to standard pipeline stages
 - Real-time data to manage win/loss ratio
- Marketing & Sales alignment
 - Visibility into lead engagement
 - Feedback loop to marketing
- Adoption Expectations and support
 - Clear usage expectations
 - Focus on efficiency



Strategic Action Plan – HubSpot CRM Integration

- What's in it for you?
 - Less administrative work
 - More focused selling opportunities
 - Stronger, targeted pipeline
 - Where we win, where we lose and **WHY!**
- Utilize AI to move from dashboards that describe the business to guidance that helps us change
 - Ability to deliver meaningful value rather than transactional support
 - More relevant recommendations
 - Operational insight
 - Proactive guidance
 - The power of AI
 - HubSpot CRM collects and aggregates engagement data
 - Identifies opportunities, challenges and priorities
 - Allows for more focused execution



Sales Portal

LS Cable & System USA*

Copper \$5.9470 (-0.0325) / Aluminum \$2.4557 (+0.0064) [02/27/2026]

Welcome DeAnna Jones! [Your Account](#) [Signout](#)

RFQ

Quote

Contract

Order

Shipment

Inventory

Invoice

Receivable

Report

Approval

Master Data

RFQ

REQUEST FOR QUOTE

IP

In Process

36

TA

To Approve

0

TG

To Generate

36

Quote

QUOTE

QU

Quote

Order

175

Contract

0

Contract

CONTRACT

CO

Contract

3

Order

ORDER

OR

Order

4141

Notice

NOTICE

Energy Sales Map

01/11/2025

EQT version E055-03 dated 2/6/2026

01/12/2024

LS Cable & System USA Cross-Reference to Okonite Okoguard® URO-3

11/01/2023

No Quote Products

09/12/2023

FG Inventory Report

09/12/2023

Account Manager Rep Assignments / Out of Office Coverage

06/07/2023

On-line Sales Tools & Resources

05/22/2023

Packaging Tools

05/09/2023

Forms

12/08/2022

New Part Number Schema

11/08/2022

Outbound Shipment Report

10/07/2022

Production Lead Time

05/02/2022

Q&A

QUESTION & ANSWER

Sales Portal – Quote Tools

Sales Operations

- EQT Worksheet
- FG Inventory
- Lead Time
- Part Number Schema
- Packaging Tools
- No Quote Products

Notice

NOTICE

LS Merchandise

Energy Sales Map

EQT version E056-02 dated 4/6/2026

LS Cable & System USA Cross-Reference to Okonite Okoguard® URO-J

No Quote Products

FG Inventory Report

Account Manager Rep Assignments / Out of Office Coverage

On-line Sales Tools & Resources

Packaging Tools

Forms

New Part Number Schema

Outbound Shipment Report

Production Lead Time



Pricing and Strategy



Rustin “Dr. No” Reagin
Cable Business Strategy Director

“Tariffs? What Tariffs?”

- Tariffs are in place and here to stay...for now
 - The most impactful tariffs for the electrical wire and cable industry are those imposed under Sec. 232. These are directed at steel, aluminum and copper derivative products. For the most part the adders for these tariffs are covered in the metal index premiums (Comex vs. LME for CU and MW US Transaction Premium for AL).
 - Typically, in a stable environment tariffs are already calculated into the costs of goods.
- What about tariffs challenged in Supreme Court?
 - The “reciprocal” tariffs filed under IEEPA were struck down by SCOTUS. However, the Administration will implement tariffs under other code sections and will seek tariff authority through Congress.
- Tariff disclaimer will remain on all quotes...for now
 - To date LS Cable has not exercised any tariff based adjustments to P.O. prices at time of invoice.

Leading with Lead Time

- Demand for MV cables is outstripping domestic supply
 - With multiple mega-scale data center projects reaching critical construction stages simultaneously, US suppliers cannot keep pace. While LS Cable's lead-time is still among the best in North America our advantage is only 2-4 weeks.
 - Offshore MV cable suppliers are pouncing on these opportunities as they can undercut lead-times and pricing power enables them to overcome any tariff or increased component and logistics costs
 - We are trying to maintain our competitive lead-time as we secure load for new capacity. We *plan* to dedicate a portion of the early additional capacity to replenish our stock position on key CU MV-105 constructions.

Quotation Frenzy

- Desperate times....spike the volume and dispersion of quotes.
 - For varied and multiple reasons, project owners, developers, and contractor are desperate to find the best lead-time and best price, now! They are reaching out to more intermediaries in more geographies more frequently, deferring awards until the last minute.
 - We have provided in excess of thirty quotes for a single project through multiple electrical distributors across multiple Rep territories and through multiple master distributors.
 - Proper identification of projects and bid stage are critical to insuring we make the best pricing decisions to position LS Cable and our Reps. for success.

What's next?

- More capacity is coming...but...
 - LS Cable's new production (CCV3 & CCV4) is progressing as scheduled. We plan to commit this new capacity intelligently in on order to maintain our position and attempt to improve reliability. However, other domestic (Prysmian, Nehring) and offshore manufacturers (APAR, TF, Hellenic, Polycab) are planning additions to capacity and/or expansions of import efforts.
 - Good intel and great service are key.
 - Let us know what you hear.



Marketing



Iram Mostofa
Marketing Support Coordinator

Social

Marketing Update



■ LS Cable & System USA on Facebook and LinkedIn

— LinkedIn

- Followers: 10,261
- 14.3% Increase in followers in Q2 2026 from Q1 2026
- Maintaining the highest engagement rate (10.03%) among our North American competitors
- April was our best performing month on social this quarter
 - Employee recognition posts were the primary driver

— Facebook

- Our audience is mainly the workers and community in Tarboro, NC
- Followers: 187 Followers
- Impressions: 6,341
- Engagements: 115
 - With a small audience based around Tarboro, numbers for Facebook will be skewed.

Website Analytics

Marketing Update

- Continued monitoring Google Analytics
 - Most visitors came through organic Google searches, a sponsored ad, or went to our website directly.
 - Accounted for 87.3% of traffic
 - Unique Page Views: 5.1K since the start of Q2
 - Home page, News Page and the Products Page had the most views.
 - NC, TX, GA, VA, and CA accounted for the most new user traffic
 - Ad Campaigns on Google and LinkedIn
 - We are running paid ads with a new vendor this quarter
 - Quality and performance of ads have improved since switching



New Rep Updates

Marketing Update

- Thank you for the engagement with recent email campaigns
 - If you have not yet, please take on our latest challenge with Rep Cup
 - More of these campaigns will pop up throughout the year
- We tweaked how to order merchandise
 - There is now a form to select which items you would like
 - If you have any feedback, please let us know
- Based on feedback, we will further expand our vertical market pages/collateral
 - We are going to tweak our existing vertical pages (Data Center, Hospitality, Renewable, etc.)
 - These changes will also include printed collateral associated with each market soon



Hello - WE'VE REACHED THE FULL 90 OF REP CUP 🏆

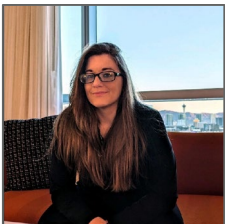
The group stage is nearing the end, and the drama is building up. The stars showed out again with Ronaldo joining the party scoring two goals.

The third quiz is now live. Put your World Cup knowledge to the test and compete for the grand prize. **Complete the third quiz by 11:59 P.M. on Thursday, July 2nd.**

[Take the Quiz Here](#)



Sales Operations



Leigh Wolfe
Account Manager and Training Specialist

Training

Sales Operations Training Update

- New Hires and Retraining
 - One new Rep agency went through the introductory training session
 - One rep from the new Rep agency requested a solo session
- New Hires for LS
 - Two Regional Sales Managers have gone through the introductory onboard training.
- Resources
 - LS's Inside Sales team met with an SAP consultant
 - Resulted in needing to create a couple of new manuals.
 - Updated existing manuals
 - New Methods on how to complete internal processes necessitated new manuals
- What now?
 - Continue refining training materials
 - Collaborating with other Account Managers to create new and updated instructions
 - Reach out to new hires and new rep agency for sessions

Should you have any questions or would like training regarding Sales tools and Resources please don't hesitate to reach out.



Ready.

Set.

Sell!