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– Trevor Smith, National Capability Manager

A toast to Independent Liquor

Independent Liquor is one of New Zealand’s most dynamic and successful alcoholic multi-beverage companies.

Recognised for their innovation, tenacity, flexibility and blistering speed-to-market, they’ve always been ahead of the game with retail marketing tactics designed to incentivise their customers and deliver increased profit margins. This focus is a strong driver to provide staff and retailers alike with a truly unified and customer centric sales solution.

The leapfrog challenge

Competition in this industry sector is keen, and Independent Liquor’s national sales force takes the lead in achieving the competitive advantage.

Sales reps walked in to see customers carrying laptops installed with an old and clunky stock ordering system and huge A3 audit pads to painstaking fill out by hand. Instead of building relationships, sharing insights and providing advice based on analysis of their customer’s sales, reps wasted precious time on administrative tasks. Handwritten compliance sheets arrived by post, email or fax and had to be manually ticked off on a spreadsheet. Information was scattered, and reports took too long to prepare.

Independent Liquor knew they needed to sharpen their act if they wanted to grow their customers’ businesses as well as ensure product and marketing compliance. They needed to bring together the data distributed between spreadsheets, the company’s ERP and their sales reps’ heads.

In late 2013 Independent Liquor knew the time had come. “This came in tandem with our need to change our business model,” said Trevor Smith, National Capability Manager for Independent Liquor. “We had a push model, and wanted to change to a pull model. We also wanted to change our guys from being traders to business managers.”

A big jump ahead

The company recognised that everything needed to be accessible from one place - customer information, promotions, bespoke pricing, compliance checks, notes and opportunities.

Independent Liquor made a deliberate decision to not buy an ‘off-the-shelf’ solution. Instead, they invested the time, effort and money in building a solution to reflect their own business model.

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Industry: Manufacturing and distribution
Project Type: CRM Implementation

Quick Facts:

Website: www.independentliquor.co.nz

Customer Size: 250

Solutions: Microsoft Dynamics CRM 2013

Users: 100

Year: 2014

Benefits:

- Quantifiable improvement in revenue due to reps having more time to upsell, cross sell and add value
- Faster and better decision making due to a 360 degree view of customers through sales data and analytics

- Improved customer support, service, compliance and reduced credits
- Transformation of reps into business managers
- Transformation of the business sales process from a push model to a pull model

Dave Wyers, an independent CRM consultant working with Independent Liquor to help develop the solution, agreed with this decision. “If you buy something off the shelf, that’s it. That’s what you’ve got. The power of the approach that Independent Liquor has taken is that in the future they are able to take this solution to wherever they need it to go.”

The solution they envisaged brought all the data they needed together by integrating a CRM with the company’s ERP (Microsoft Dynamics AX), their data warehouse, a survey tool (Survey Gizmo) and a mobile application platform.

Partner first, solution second

Although initially seriously considering Salesforce as the CRM to underpin the new sales solution, the choice of partner became the deciding factor. “Rather than it being a Salesforce versus Microsoft choice, it boiled down to who we felt would be a true business partner for us. We thought long and hard about it, and it was because we had more confidence in Koorb and their ability to deliver that we chose Dynamics CRM,” said Smith.

Independent Liquor’s trust in Koorb was not misplaced. “Koorb were fantastic to work with,” said Smith. “Nothing was too much trouble, and we had the utmost confidence in their advice, technical ability and professionalism. At times they challenged us based on their experience and business knowledge, which made us rethink our direction and kept us on track.”

The other key partner in the project was application development company, Smudge.

Cleverly customised

The app which front ends the CRM uses Geo location to locate customer sites. When they open up their iPad they are presented with specific customer content, including terms of trade, relevant discounts and rebates.

“Now our sales people can visit customers with an iPad, and every single bit of information they require is on there. Instead of saying ‘Joe, let’s talk about an order’ they can say ‘Joe, let’s have a look at how you’re tracking, and how we can help you sell more product’,” said Smith.

Current sales data, compliance checks, trending products and opportunities are right there onscreen. The app is designed so that there’s nothing on screen that a customer shouldn’t see. This turns the order taking process into a collaborative experience as the rep and customer view sales histories and reports by brand or category, pricing and marketing strategies. The sales rep is transformed into a business manager, helping customers to grow their businesses.

The app replaced the cumbersome A3 pad with a smooth and intuitive interface. It processes data both online or offline so the rep’s ability to work isn’t reliant on internet access. “The compliance check for one of our Banner partners, for example, is now very detailed and takes around 25 minutes,” said Smith.

“Previously on paper the same survey was generic and lacked detail. Now it’s all done onscreen, submitted, and two minutes later the data is sitting in Survey Gizmo which is integrated to our CRM. From here we can easily run the reports we need.”

Great aptitude!

Cleverly, the app displays a different depth of information depending on whether it’s the iPad or smartphone version.

The app on the smartphone is personalised towards the needs of the rep and gives them the ability to track their own performance. It shows a level of detail including the rep’s sales figures for the month-to-date vs. their overall target, the GP versus total sales, the volume they’ve sold and number of orders they’ve placed.

When they turn their iPads on at the start of the day the reps are presented with their call cycle register for the day, week and total customer base. They see a summary page showing all outstanding tasks, queries, draft orders which haven’t been submitted, the status of back orders, and other designated tasks and notes for the day’s calls.

Reps can also send tasks to the promotions or graphics teams for merchandising material.

Cool collaboration

Independent Liquor’s merchandisers also have iPads and smartphones providing their own view of the information they need from the CRM. Customer services use the CRM to assign tasks, in real-time, to reps and merchandisers. With the ability to take photos on the spot and tag them against a customer’s CRM record, reps can see when new displays have been installed, and merchandisers can see when a display needs to be replaced, repaired or restocked.

Independent Liquor make extensive use of Yammer, the popular social network service for businesses. Marketing and merchandising reps in particular use it to share information on competitor activity and new products, and showcasing well set up or innovative displays. Yammer groups have been so successful, with 50-60 posts a day, that they’re now earmarked for integration into the app itself, so reps can upload real-time feedback while with a customer.

User uptake

Independent Liquor has been particularly pleased with the user uptake.

“Our sales team love it,” said Smith. “We haven’t had any staff turnover or pushback because of the new systems. If anything, we’re actually getting the opposite. Our people are saying ‘fantastic, it’s about time. We’ve now got everything at our fingertips - and actually - can we also have this, this, this and this?’ We’ve had a much higher level of engagement and ownership than anticipated.”

Behind the scenes

The delivery of the solution saw tight teamwork between a small but dedicated group from Independent Liquor, Koorb, Smudge, Insightful Mobi and Cosys

They used an extensive white boarding process to mock up what the solution should look like and how it should operate. Independent Liquor were determined to achieve the best possible outcome. So they made a careful choice of internal stakeholders to maintain a clear overall vision of the business needs, and also sought input from leaders in the field. It took less than six months to go live, including the initial readying of back end systems and ensuring data integrity.

Credit where credit's due

The new solution has smoothed the path when it comes to credits. As the rep is unable to alter predetermined pricing for each outlet Independent Liquor are experiencing both fewer credits and pricing queries, and faster resolutions if there are credit queries.

With the time required for order taking, checking compliance and other administrative tasks being dramatically cut, the reps' productive time has increased by several hours a day.

This gives reps time to add further value to their customer accounts by introducing new competitive products, upselling

and cross selling. The resulting increase in customer order volumes across a wider range of products has delivered a quantifiable improvement in the company's revenue.

Now management and back-office customer service reps have a 360 degree view of customers through sales data and analytics, decision making is better and faster.

With sales and customer service now sharing the same records, customer's requests are dealt with far more efficiently and cohesively.

Customers are enjoying the new level of technology and working with their rep on the iPad, so it's a win/win situation for all.

Drinking to success

Smith is standing proud behind the new solution. "Our competitors have all got their own systems; most of them are bought off the shelf. I'm not knocking that, but I feel that our decision to design our own system positions us well to stay a long way out ahead of them."

Now they're on a roll, Independent Liquor isn't planning to stand still. Further iterations of the solution will give the sales team even more functionality. These sophisticated technology tools, coupled with an ongoing training programme, means more strategic relationships with their customers, and sales reps becoming true business managers.

About Koorb Consulting

Koorb Consulting is one of New Zealand's leading Microsoft Dynamics partners.

Established in 1999, the company is 100% New Zealand owned and operated by the Directors, Nicholas Birch and Paul McDowell-Hook. Both Directors work in the company. We have offices in Auckland, Wellington, Christchurch and Dunedin.

The main focus of our business is implementing and supporting Microsoft Dynamics AX (Gold Partner), Microsoft Dynamics CRM (Gold Partner), Microsoft Business Intelligence (BI) Solutions (Gold Partner) and Microsoft SharePoint (Silver Partner). We are proud to have completed more Microsoft Dynamics AX

implementations in New Zealand than any other partner, and our relatively new Dynamics CRM practice is rapidly acquiring a customer base which includes some of the most iconic Kiwi businesses and organisations.

Our CRM projects are noted for the delivery of immediate business outcomes, resulting in outstanding customer acclaim. We won the Microsoft New Zealand Dynamics CRM Partner of the Year award last year and the Innovative Technology for Good Citizenship award for 2015 for the Plunket ePHR project.

Microsoft Partner

Gold Enterprise Resource Planning
Gold Customer Relationship Management
Gold Business Intelligence
Silver Collaboration and Content



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