



CASE STUDY

BUTTERFIELD & VALLIS SERVES UP A FUTURE-PROOF SALES SOLUTION WITH JLAN MOBILE TECHNOLOGY

Their 20-strong field team now enjoys a tablet-based solution that is specifically built to allow easy order creation that synchs with the ERP, provides offline access and an on-demand gateway to critical information for the daily customers that depend on them.



OVERVIEW

Butterfield & Vallis imports, distributes and delivers more than 13,000 skus of food and food related products to a broad range of customers in Bermuda. One of their divisions, The Consumer Products Division, focuses on the distribution of products into supermarkets, grocery and convenience stores by way of 18 sales reps and a fleet of 20 trucks. These field service reps had been using a mobile order entry system that was custom-designed especially for them. Because the software was designed to be used on laptops and netbooks in the field, current hardware technology was no longer available to support it, forcing the company to look for an alternative solution. Additionally, the legacy system took an inordinate amount of time to synch every day, sometimes 20-30 minutes or more, making it a pain point for all involved.

It was crucial that their sales reps would be able to take new orders on a mobile device in order to get those orders shipped

as soon as possible to avoid stock-outs at the store level.

The mobile solution also would need to be 100% capable of running off-line, since sales reps couldn't always count on a wireless internet connection while inside the customer's location.

Food distributors typically carry a large assortment of products and B&V is no exception with over 5,000 products in the Consumer Products Division. It is also typical that their customers only purchase a subset of these products in a fairly repetitive pattern. Furthermore, food product sales are driven by customer-specific pricing and promotional offers. It is critical that the mobile software utilized by the mobile reps would allow them to quickly sort through products and buying history to allow them to have meaningful interactions and upsell opportunities at the point of sale with their customers.

Butterfield mobile sales reps needed deep and accurate information, including customer buying history, customer specific pricing, promotions and inventory availability data in order to properly service their accounts. Some of this data was in the existing mobile sales system and some was trapped in the back-office ERP system. What was needed was a way to integrate the two systems, providing the reps with access to real-time data, making the most of their time and supporting greater efficiency in the process.

INDUSTRY

Food Distribution

CUSTOMER PROFILE

Butterfield & Vallis has been in business since 1923, and is a leading distributor of food and food related product distribution in Bermuda. Supplying restaurants, hotels, grocery stores, specialty food retailers, convenience stores and more, their 13,000+ skus are representative of some of the world's top brands. The Consumer Products Division sells 5,000 items and boast a fleet of 20 delivery trucks and a mobile field sales team of 18 representatives.

BUSINESS PROBLEM

Their custom-written mobile order entry software was designed to run on netbooks and laptops, and was not supported by new mobile technology. There was a need to upgrade systems to work with newer mobile technology (tablets and smartphones) and their ERP. The solution also needed to be able to run 100% off line because of unreliable internet connections while inside the customer locations.

SOLUTION

B&V contracted jLan Technologies to implement jLAN Mobile which was further customized to adapt to B&V's unique process. The result was an end-to-end software package that would streamline their sales, ordering and reporting processes, connecting with their existing ERP, Microsoft Dynamics GP.

BENEFITS

- ⌘ All legacy hardware replaced with Microsoft Surface tablets
- ⌘ Touch-screen technology allows reps to complete orders much faster
- ⌘ Eliminated long synch times, making working hours more productive
- ⌘ Reps have all data at their fingertips, including customer buying history
- ⌘ Reduced incidence of out-of-stock situations
- ⌘ Instant delivery to the Dynamics platform for fulfillment of next-day delivery promise

"jLan was able to add the customizations we needed to the solution to meet our needs, ensuring that we could deliver on the service that our customers expect."

William Mayor
CIO and VP Finance

BUSINESS PROBLEM

Butterfield and Vallis Consumer Products Division runs a busy sales team, representing more than 5,000 skus to a range of food outlets in Bermuda. Because their reps each handle a subset of their portfolio, each outlet may be visited by multiple B&V reps – one for dry goods another for meats, etc. While on-site, the rep needs to have a complete record of the customer's buying history, they need to know their current inventory position, and they also need to know about any current in-force promotions or specials. Pre-orders are captured through the week and delivered to the ERP system for processing. Deliveries are then made within the following 48 hour period.

The problem was that B&V was running a custom mobile order entry solution that was designed for netbooks and laptops, and would not run on tablets or newer mobile technology. The order process became tricky and cumbersome, as it took 25-30 minutes to synch the legacy devices, and without touch-screen technology, it was difficult to scroll through inventory. Additionally, the system did not notify the sales person whether the order had been received by the ERP system, which from time to time resulted in orders not being completed and customers being disappointed.

Another complication was that since they were running a custom solution, it had been necessary to run a range of 3rd party products in order to make everything work together. This made for a complicated process that, in the end, just wasn't working any longer.

THE SOLUTION

The ideal solution was to consolidate and synchronize data from both systems to properly equip the sales rep with the most accurate picture of the customer account, and more importantly, their buying history.

Some of the unique business processes used by Butterfield that the jLAN solution needed to support included:

- Site-based pricing to dictate that the sale price of an item could potentially change depending on which B&V warehouse it was shipped out from.
- Ability to handle Catch Weights: included in the Butterfield product offering are 'Catch Weight' items. For example; some items can be sold by the case but priced by the pound. Proper handling of Catch Weight items presents a challenge to any ordering software. jLAN was able to handle it.
- Item promotions set up in the back-office Dynamics GP system. These promos are complex, and the new mobile system needed to be able to handle all promotional scenarios.
- Just as important as the ability to handle promotions on the front end, client also had very specific requirements as to how to handle promotions on the back end. It was imperative that the mobile system could accurately update the correct GL accounts in order to properly track promotional expenses in the income statement.

THE SOLUTION- CONTINUED

- Sales reps needed a user-friendly interface that would allow them to sort through 1000's of products, and at the same time know if certain products were authorized to be sold to certain customers. jLAN Order Guides provided the functionality to address this need.
- As part of B&V's normal selling process, the rep would need to physically count the stock at the customer's location in order to track sell-through, and more importantly, know what quantities to reorder. jLAN provided stock-count functionality as part of the customer order guides. By coupling the stock counts with the order guide, sales reps can capture inventory counts while still within the sales order entry process.
- Maintain a minimum gross margin: allow sales reps to change a price, yet not allow them to go below a minimum pre-determined gross margin.
- Sales reps needed to know the expected arrival date for items purchased. This way, they could advise their customer of the expected arrival date for out-of-stock items.

The jLAN Mobile solution has already saved hundreds of hours for B&V, just on synch time alone. Reps are better able to service their accounts, with real-time accuracy and touch-screen efficiency. Their new Microsoft Surface tablets with the jLAN Mobile software have provided an easy way for them to get connected when they need to, and to navigate to the information they need in a fraction of the time it was taking before. Add to that the increased efficiency of the ERP synch process, and we've got a win-win on both ends.

"Its easy to use, and great to know that an order has been successfully received by the ERP system in real time. The sales people love being able to look at all of the sales history of an item purchased by a customer-no matter if it originated from the jLAN system or from the ERP (this was a limitation of our custom solution)."

William Mayor
CIO and VP Finance