



A better way to manage your data



SUCCESS STORY: F500 Houseware Retailer

Company

This F500 Houseware Retailer sells a range of domestic merchandise and home furnishing through 1,000+ retail stores.

Industry

Retail

Application

Customer Relationship Management

Summary

A F500 Houseware Retailer deployed TrackVia to manage its Platinum Customers and the results have been compelling:

Business Impact: Substantially improved Sales' ability to proactively manage and sell to customers

ROI: Approximately 91% cost savings versus CRM application

Payback: Less than 1 day

Challenge

This F500 Houseware Retailer, together with its subsidiaries, operates a chain of retail stores selling a range of domestic merchandise and home furnishings. As of early 2009, the company operates over 1,000 retail stores in North America.

Three years ago, the F500 Houseware Retailer realized that it needed to take a different approach with the top 10% of its customers. Developing proactive, direct selling relationships with these Platinum Customers offered a large growth opportunity. It could offer these customers better service and special promotions and the result would be a larger, steadier volume of purchases from this customer base.

The Platinum Sales Group assumed responsibility for acquiring and managing these customers. It started off managing account data using Microsoft Access, but quickly ran into the following challenges:

- Microsoft Access required support from IT for modification and maintenance – however, IT resources were unavailable to the Platinum Sales team due to assignment to other projects
- The group had difficulty tracking data and responding to customer inquiries due to corrupt data and technical knowledge required to search for data in Access
- Understanding customer purchase history was difficult given the complexity in getting Access to report down to the SKU level by customer, date, and location
- E-mail contents had to manually be added to Access in order to keep a history of customer interactions
- Management reporting, especially ad hoc inquiries, was very time consuming

These challenges prompted Tim Georgens, Platinum Sales Manager, to search for a solution that would be simple to deploy / maintain, inexpensive to own, and easy for a team to share regardless of where they are located.

Collect
Organize
Share

“Serving an existing Platinum Customer is completely different than serving a customer that walks in the door. We need a complete and accurate order history so that we can recommend the right products, at the right price, at the right time. Data management is a critical piece to providing this level of customer service. With TrackVia our problems are solved – plus, we were able to set it up in less than a day!”

—Tim Georgens,
Platinum Sales Manager

Solution

Georgens knew he had to move away from Microsoft Access to a powerful but easy to use tool that his team could maintain without support from IT. His knowledge of CRM packages like Salesforce.com told him that these offerings were “too pricey” for what he wanted to do. He started investigating online databases and came across TrackVia through an internet search. After a brief trial period, Georgens was sold on TrackVia’s power, simplicity, and price. With TrackVia, his team was able to accomplish the following:

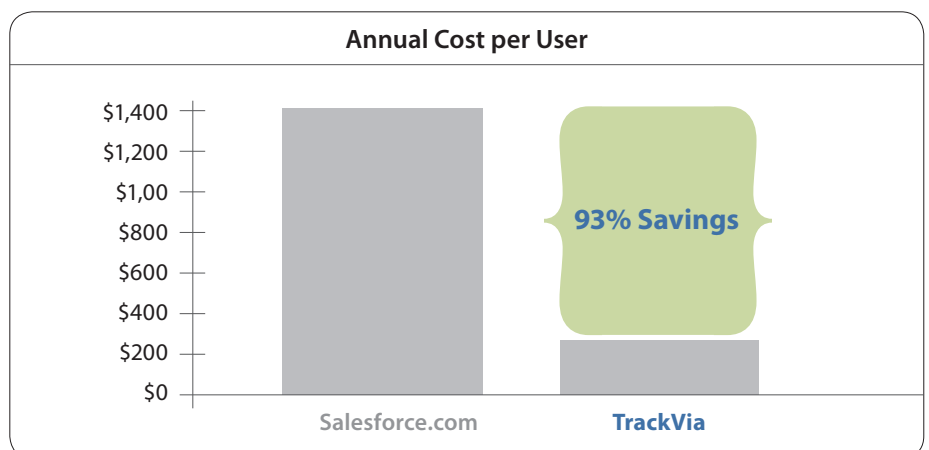
- Setup the relational database and import the data within one day – without help from IT or external consultants
- Input each purchase for each account down to the SKU level and quickly / accurately run an internet-style search when customers call with ad hoc questions or requests
- Easily create views and reports that allow service representatives to determine, by account, when specific products are needed by location. This capability allows each representative to call their accounts to proactively prepare them for their next buying cycle and prevent a stock-out situation.
- Quickly create powerful business reports that allows management to assess the revenue and profitability of the direct-to-business operation

With TrackVia, Georgen’s sales team has been able to provide exceptional service to the company’s best customers.

Benefits

Implementing TrackVia to manage Platinum Customer accounts has yielded tremendous benefits for this F500 Houseware Retailer. Sales have grown rapidly – nearly 100% per year over the last three years – and TrackVia has been a big part of that success since it enables proactive sales and service to those accounts. Moreover, the Platinum Sales teams saves over 90% in software costs per year by using TrackVia instead of CRM offerings like Salesforce.com.

Using TrackVia, Tim Georgens’ team has been able to run and grow a burgeoning business that requires a new approach to managing customers, one that the F500 Houseware Retailer is unaccustomed to using. Georgens states, “We would be lost without TrackVia – using another



tool would make it more difficult to run the business.” TrackVia also allows the Platinum Sales team to generate regular reports for management that allows them to garner additional support and investment for this growing business.