

CUSTOMER SUCCESS STORY



This F500 Retailer sells a range of bedroom, bathroom, and other home furnishings through 1,000+ retail stores across North America.

“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
Fortune 500 Retailer

Summary

A F500 Retailer deployed TrackVia to manage its Platinum Customers and the results have led to substantially improved sales' ability to proactively manage and sell to its key customers.

Challenge

This F500 retailer, together with its subsidiaries, operates a chain of retail stores selling a range of bedroom, bathroom, and other home furnishings. The company operates over 1,000 retail stores in North America.

Several years ago, the company's management team 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 and maintain, inexpensive to own, and easy for a team to share regardless of where they are located.

Solution

Georgens knew he had to move away from Access to a more 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. After a brief trial period, Georgens was sold on TrackVia's power, simplicity, and price.

TrackVia OnLine Database
Professional Edition



With TrackVia, Georgens' 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 and 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 is now 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 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.

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 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.

About TrackVia

TrackVia delivers the world's most secure, flexible, and scalable OnLine Database and Application-Building Platform designed for Business Users. TrackVia balances business-user empowerment with enterprise-class performance, scalability, and end-to-end security. The result: A data management and collaboration solution that even the most skeptical Internal IT organizations can champion. To-date, over 1000 customers across the globe rely on TrackVia, including ADP, Healthways, US State Department, the TSA, US Olympic Committee, Samsung, and US Cellular.

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