TRACKVIA

Background

A global provider of security logistics solutions was looking for a better way to manage the supply chain for its electronic cash management product–including taking customer orders, scheduling customer installations, shipping products, and tracking inventory.

The three objectives were to find a robust database management system that would:

• Consolidate all data into one repository
• Provide access for both internal and external users
• Enable customized views of the data in real time

From Excel spreadsheets to database management

Before TrackVia, this global company primarily relied on Excel spreadsheets to manage one of its premier products. The problem was that every customer order required a separate spreadsheet–with more than 60 data fields–and those orders then needed to be uploaded to another spreadsheet called the order tracker. Seldom were all the fields complete. Customer information such as addresses and phone numbers were often missing or incomplete. To provide the most accurate orders to the manufacturer, one full-time employee spent every morning cleaning up the missing data, calling sales representatives, and completing the orders. Then the information was downloaded so that it could be shared with the manufacturer at mid-day.

This inefficient process prevented more than one person–or department–from being able to access the spreadsheet at a time. Everyone from the sales team, manufacturer, installers, and technicians had to wait to get the information they needed to complete their part in fulfilling customer orders. "Basically what we had was a static process that was full of lag time," says one of the business analysts. "We knew we needed a better database management system, so in November of 2008 we began researching off-the-shelf software to see if there was something that could meet our needs." After years of managing the ordering and fulfillment process through multiple spreadsheets, there was a desire to find a Web-based solution to streamline the process. In just a few weeks, a free trial of TrackVia had been downloaded and the team began customizing the easy-to-use, Web-based tool.

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>
> Business Analyst
> Fortune 500 Security Logistics Company

F500 SECURITY LOGISTICS

Based in the United States, this Fortune 500 company is a global leader in security-related services. Their customers include banks and financial institutions, retailers, miners, pharmaceutical companies, jewelers, and government entities in over 100 countries.

Fortune 500 Security Logistics' Solution

Streamlining the workflow through a dynamic solution

The first step was to combine all the different versions of the Excel spreadsheets and consolidate them into one database. Once this was done, the team began creating filters so each stakeholder could view just the information they needed to do their jobs. One of the biggest positives of TrackVia was that all the various groups could touch the system when they needed to, and not wait for others to finish their tasks. Literally overnight, what had once been a sequential process was turned into a dynamic, real-time system where all users have access to the same data.

TrackVia also brought much-needed discipline to the ordering process. Due to required fields, the sales team was no longer able to submit incomplete orders without them being rejected. This helped eliminate endless phone calls to track down missing information and streamline the installation process by ensuring that a site survey was complete and a customer location was ready to receive the product before it was scheduled for installation.

Becoming more responsive to customer needs

Without a doubt, the biggest benefit of TrackVia was the newfound ability to meet customer requests for reporting and product status. One of the company's largest customers had repeatedly asked for a daily report to show the status of their product. Before TrackVia, creating this report was extremely labor intensive since it was entirely manual and was prone to errors. With a centralized solution, all customer events and data were merged into one system. Now this report is produced daily in a just a matter of minutes—as opposed to hours—and has become one of the most important tools the customer uses to manage its operations.

Increasing productivity through streamlined processes

Not only does the sales team use TrackVia to order products, but it is also used to manage product inventory, identify rush orders, schedule installations, authorize returned materials and provide maintenance. Now the company reports that it has cut the cycle time in half by making every part of the process more efficient. Lag time has been eliminated and replaced with better communication across the supply chain. Most importantly, the data for more than 10,000 products and the customers who own them is now consolidated in one database.

Over 10K

The number of products—and data on the customers that own them—that is now managed in this Fortune 500 company's custom TrackVia application.

CRITICAL SYSTEM REQUIREMENTS

- Central online database
- Real-time collaboration tools
- Robust user permissions for internal and external teams
- Real-time, customized dashboards and reports
- Order process controls
- Automated alerts
- Rapid deployment