



Microsoft Business Solution Partner Case Study

Cake Supplier Cuts Order Time by Deploying Integrated Business and Finance Solution

Overview

Country or Region: United Kingdom

Industry: Food and Beverage

Customer Profile

Cakes for the Connoisseur supplies a broad range of products, including cakes, biscuits, and snacks to more than 10,000 independent retailers and food service customers in the United Kingdom.

Business Situation

A lack of integration across the company's IT systems meant that order and supply relied on manual processes, which were error prone and slowed down ordering and delivery to customers.

Solution

Cakes for the Connoisseur rolled out Trinity's Myridas software modules for Microsoft® Business Solutions–Great Plains®, which integrate with Microsoft Windows Mobile™-based Pocket PCs used by sales staff in the field.

Benefits

- Order to dispatch lead times reduced
- Better cash control
- Better customer experience
- Tight business controls
- Better fleet utilisation

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Wendy Wroe, Financial Controller, Cakes for the Connoisseur

U.K. company Cakes for the Connoisseur supplies cakes and snacks to thousands of customers across the country and its sales staff operate mostly from the field. Until recently, a lack of integration across the company's IT systems meant that order and supply relied on manual processes. Cakes for the Connoisseur deployed Myridas software modules for Microsoft® Business Solutions–Great Plains®, which were developed by Microsoft Gold Certified Partner Trinity. These give employees real-time access to the company's data systems on Microsoft Windows Mobile™ devices. Now, staff can place orders on the devices, reducing order times from a number of days to a few minutes, and access valuable information from the field. The solution has virtually eliminated incidents of out-of-stock orders and customer queries, and has given the finance team much greater control over the business.

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Wendy Wroe, Financial Controller, Cakes for the Connoisseur

Situation

Cakes for the Connoisseur supplies a broad range of products, including cakes, biscuits, and snacks to independent retailers and food service customers throughout the United Kingdom. Operating from four regional depots and a fleet of vans in Scotland, the company has more than 10,000 customers nationally and sells some of the country's best-known brands.

Keen to improve customer service, Cakes for the Connoisseur identified the need for greater control and automation within its business. There was little or no integration between its standalone sales order processing system, its nominal ledger, stock control, and purchase ledger systems. The disparate views of data made the information difficult to interpret across the business.

Wendy Wroe, Financial Controller, Cakes for the Connoisseur, says, “Critical processes such as data entry and reporting were carried out manually, which was time consuming and error prone.”

In the field, sales representatives were unable to check their figures against company targets. Instead they had to make estimates based on past figures. And with no access to stock data, they used a printed list to place orders against. This often resulted in numerous orders for out-of-stock items. Representatives filled in order forms and posted them to depots where data was entered manually. As a result, it sometimes took days to process customer orders.

The delay meant customers often queried their sales orders, which were hard to identify in the system and took some time to resolve. “To drive the business forward, the sales and management teams needed access to more timely and up-to-date information so we decided to invest in new technology to

underpin all aspects of the operation,” says Wroe.

Solution

After examining finance-based software systems such as Sage and Exchequer, Cakes for the Connoisseur was introduced to Trinity, a Microsoft® Gold Certified Partner. Trinity's Myridas software modules for Microsoft Business Solutions–Great Plains® software provide business-specific functionality for efficient product distribution, while Great Plains financial tools enhance visibility and control of financial information.

Myridas solutions offer a complete distribution system. “We saw that Trinity could provide the perfect combination of business fit and long-term investment protection. Trinity consultants worked closely with us to define and implement a solution that has delivered far-reaching benefits to the sales, logistics, management, and finance teams,” says Wroe.

The entire picking, packing, and shipping process within Cakes for the Connoisseur are now supported by a fully automated system, minimising errors.

Cakes for the Connoisseur's 24 field sales representatives collectively generate 500 orders a day. Using a handheld device with Microsoft Windows Mobile™ 2003 software for Pocket PCs, they can scan bar codes on price lists from the field. The device integrates wirelessly with the company's stock control system so the user can check stock levels in real time, and then transmit the customer order automatically to the nearest depot.

Before, representatives had to maintain manual customer records. Now, each sales representative has access to detailed customer information, including purchasing histories. All the information they need to

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Wendy Wroe, Financial Controller, Cakes for the Connoisseur

advise customers on their orders and stock levels is at their fingertips. And accurate sales figures can be checked in real time so the representatives can monitor their progress against sales targets.

Trinity's Myridas Load Planning module helps Cakes for the Connoisseur to best utilise its delivery fleet. It automatically allocates orders to vehicles by calculating the remaining load space based on the physical size of each order.

Another area where the solution adds value is in making the field sales teams more efficient. For example novelty products, driven by the latest fashion, are important to the business. A new cake might be produced to capitalise on a latest cartoon film or a popular Children's television programme. To promote these products effectively a strong field sales operation is required to get the message across to small retailers. Making this field sales department more efficient was a key requirement and the new solution has played a critical role in achieving this objective.

Benefits

The Trinity solution provides Cakes for the Connoisseur with a single, fully integrated financial and management information system. Where previously it took weeks to collate and analyse data, information is now readily available in real time.

Field Sales Automation Cuts Days from Orders

Order times from the field have been reduced from a number of days to a few minutes. Sales representatives no longer have to send written orders by post and wait for the details to be checked and 500 orders per day to be rekeyed at the depot—a process that took a team of six people two to three hours a day to complete.

“As well as saving time, customer service has improved significantly, with the typical order-to-delivery process cut by days,” says Wroe. “Nothing could have prepared us for the benefits we are experiencing through the integration of our systems with Pocket PC. This has revolutionised our sales process by empowering our field sales teams to book sales orders in the field. It has removed a whole layer of administration, leading to significantly improved sales efficiency.”

Enhanced Invoicing and Payment

Instead of a manually updated copy of an invoice, goods are now accompanied by an itemised delivery note. “As well as creating a positive perception of the company, the new approach improves proof-of-delivery. This has helped to dramatically enhance cash collection, with average debtor days reduced by a quarter,” says Wroe.

With the majority of sales orders now placed against available stock, the need to raise credits for out-of-stock items has been virtually eliminated. “The number of credit notes raised has reduced to around one in fifty, compared to one for every four invoices under the old system,” says Wroe.

Boosts Customer Service

Automatic allocation of orders to vehicles depending on load space will not only save costs, but will improve customer service, especially as customer requirements, such as their preferred delivery day, can be specified. “Customers now enjoy a quick and accurate sales experience without the inconvenience associated with wrong deliveries and credit notes,” says Wroe.

Paul Wood, Sales Manager, Cakes for the Connoisseur, says, “Using wireless devices, we have improved sales order-to-delivery lead times by 24 to 48 hours. I have not received a single customer complaint about the delivery of products during the last six

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For more information about Trinity Computer Services Ltd. products and services, visit the Web site at: www.trinitypartner.com

For more information about Cakes for the Connoisseur products and services, visit the Web site at: www.interlinkfoods.co.uk/products/cakes_connoisseur.html

Trinity is a founder member of the alliance of Microsoft Independent Software Vendors dedicated to bringing "best of breed" solutions to the F&B distribution sector.



for Microsoft Business Solutions

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months. As anyone involved in a busy distribution business will appreciate, this speaks volumes for our new system and the customer benefits it brings."

Greater Financial and Stock Control

With the new system in place, the finance team is able to exercise much greater control over the business and deliver accurate, timely financial reports. Weekly manual stock take is no longer necessary. Credits raised in the field against stock that is nearing the end of its shelf life are now captured electronically and immediately updated on the system.

"Product costs are accurately matched to sales to provide reliable gross margin figures. And cost allocation takes half the time. These factors have transformed the financial management of Cakes for the Connoisseur," says Wroe.

High Business Returns

"The Cakes for the Connoisseur management team is confident that the company will achieve substantial benefits from their new system. We have been able to redeploy the resources of employees who used to enter manual orders, freeing them up to concentrate on higher-value tasks," says Wroe.

"The development of the solution using leading-edge Microsoft tools ensures that our investment is future-proofed, thanks to the continuous, long-term support offered by Microsoft for its platforms."

Microsoft Business Solutions

Microsoft Business Solutions offers a wide range of integrated, end-to-end business applications and services designed to help small, mid-market and corporate businesses become more connected with customers, employees, partners, and suppliers.

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Software and Services

- Microsoft Windows Mobile 2003 software for Pocket PCs
- Trinity Myridas distribution software modules

■ Solutions

- Microsoft Business Solutions–Great Plains