Accelerating Growth from HQ Strategy to Field Force Execution

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The Coke One North America Salesforce Automation Project

ERP | CRM | SFA | MERCHANDISING | REPORTING

- **Coke One North America (CONA)** is a common set of processes, data standards, manufacturing and customer solutions tailored for North America

- In **June of 2015**, CONA embarked on a project to **replace their existing Salesforce Automation and Merchandising solutions**

CONA has implemented a solution to help accelerate growth well into the future

Future-Proof
- Solution is configurable and provided **many requirements out of the box**
- Cloud-based apps can be **continually updated**
- Apps are **built to scale** to a large number of users
- Cloud-based apps **updated with frequent capability releases**

Mission-Critical
- Spring apps are **fully integrated to CONA backend systems**
- Apps are **stable** and **reliable**
- **Focus reps on highest value-add activities**

Innovative
- The roadmap is **focused on innovation** to achieve:
  - **Business efficiency**
  - **Actionable insights**
  - **Better usability and flexibility**
  - **Lower Total Cost of Ownership (TCO)**

CONA was experiencing many challenges with the existing field sales solution

⚠️ Existing application was extremely 'heavy' and required SQL Server on every field rep device

⚠️ Field devices were heavy, clunky and expensive

⚠️ Frequent, expensive integration issues

⚠️ Orders weren't flowing from the off-line client to the ERP

⚠️ User interface was cumbersome, confusing & did not flow

⚠️ No visibility into field rep activities

CONA had three primary business goals

Improve the end-to-end sales & retail execution user experience

Provide **actionable execution insights** for **closed-loop customer interactions**

Enable **continuous improvements** to our business:

- Identify opportunities to **increase sales**
- **Focus account managers** on highest value-add activities
- Prescriptive insights to **uncover missed opportunities**

The undertaking for CONA was BIG, and posed many challenges

Needed **buy-in from 6 bottlers** to select one vendor

Each bottler had **different requirements**

The solution **must work for all bottlers**, supporting the nuances of each of their processes
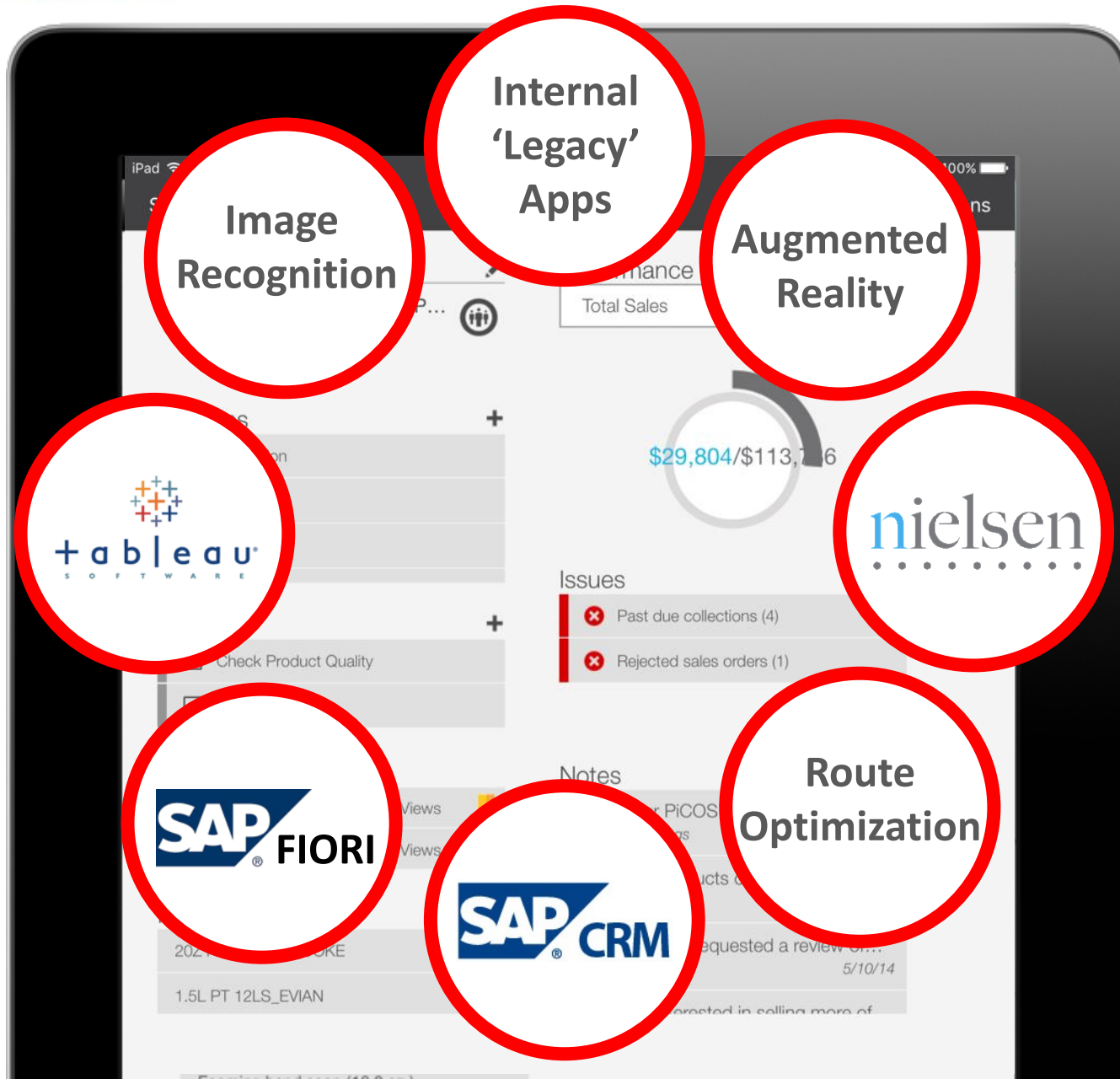
The solution **must be scalable** to over 20,000 users

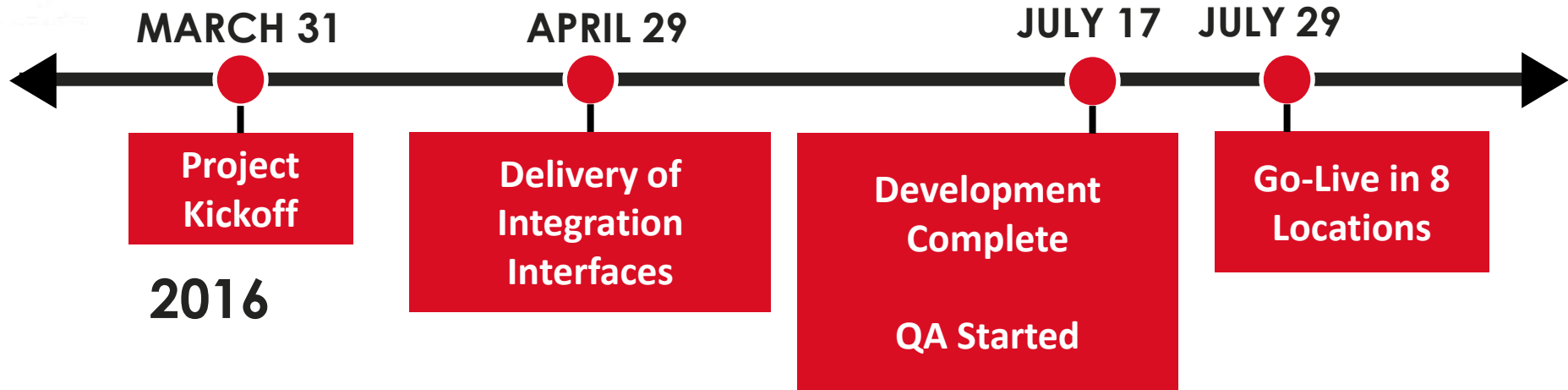# The app needed to be flexible enough to offer a different UX and OS for each bottler

Needed mobile solutions for multiple operating systems:
Android | iOS | Windows via Emulator

The goal was to have a mobile 'hub' from which all apps can be accessed

Internal 'Legacy' Apps

Image Recognition

Augmented Reality

tableau SOFTWARE

nielsen

SAP FIORI

SAP CRM

Route Optimization

CONA selected Spring and was able to implement & roll out Phase 1 in 4 MONTHS

MARCH 31

Project Kickoff

2016

APRIL 29

Delivery of Integration Interfaces

JULY 17

Development Complete

QA Started

JULY 29

Go-Live in 8 Locations

480 users rolled out in < 1 week

Key decision criteria for Spring:
1. Salesforce Automation focus, not a customer platform selection
2. Configuration instead of customization
3. Total Cost of Ownership

It has been one year since the project started…

DEPLOYMENT TO DATE

166 SITES DEPLOYED

7 BOTTLER PARTNERS

3019 DAILY ROUTES

10,086 ACTIVE USERS

919,833 SHIP-TO CUSTOMERS

11,102,135 DELIVERIES

1,250,235 EQUIPMENT SERVICE ORDERS

Phased rollout, adding users and additional capabilities with each release

Identify Scope	**Implement**	**Test**	**Rollout**	**JULY**
	Validate Reqs	**Implement**		**OCT**
	Validate Reqs	**Implement**		**MAR**
	Validate Reqs	**Implement**		**TBD**
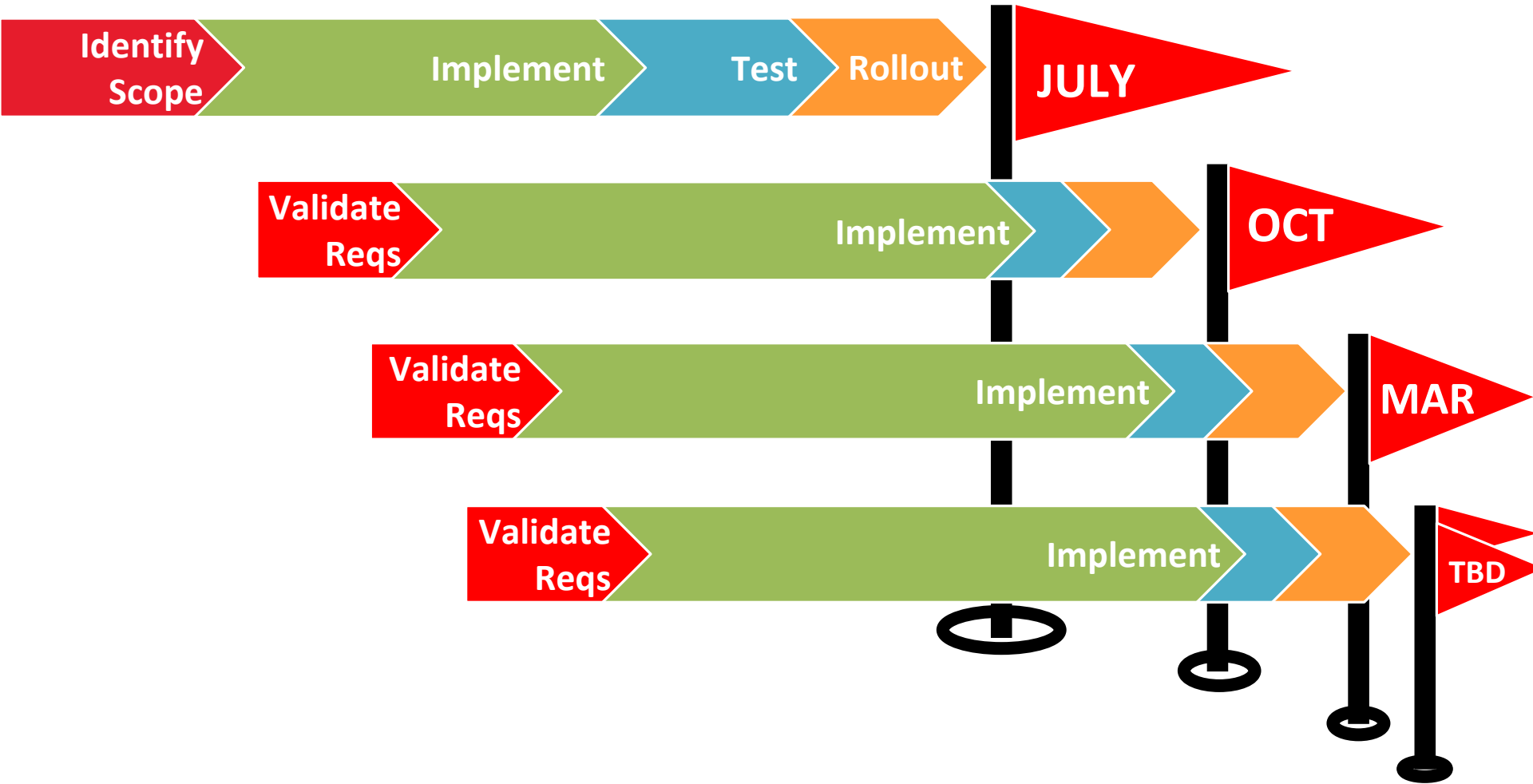
Previous issues have been completely resolved

✓ New sales force automation app **takes less than 6.4 MB on the device, with 20 – 150 MB of data**

✓ Bottlers can now use **lightweight iOS and Android mobile devices** and run the app on old PCs until they are EOL

✓ Integration issues have been **eliminated**

✓ **Orders can be taken off-line**, and will **flow directly to SAP** as soon as Internet connection is achieved

✓ The user interface is **intuitive and clean**, and requires **minimal training**

✓ We now have **complete visibility** into field rep activities

Benefits have been significant for HQ
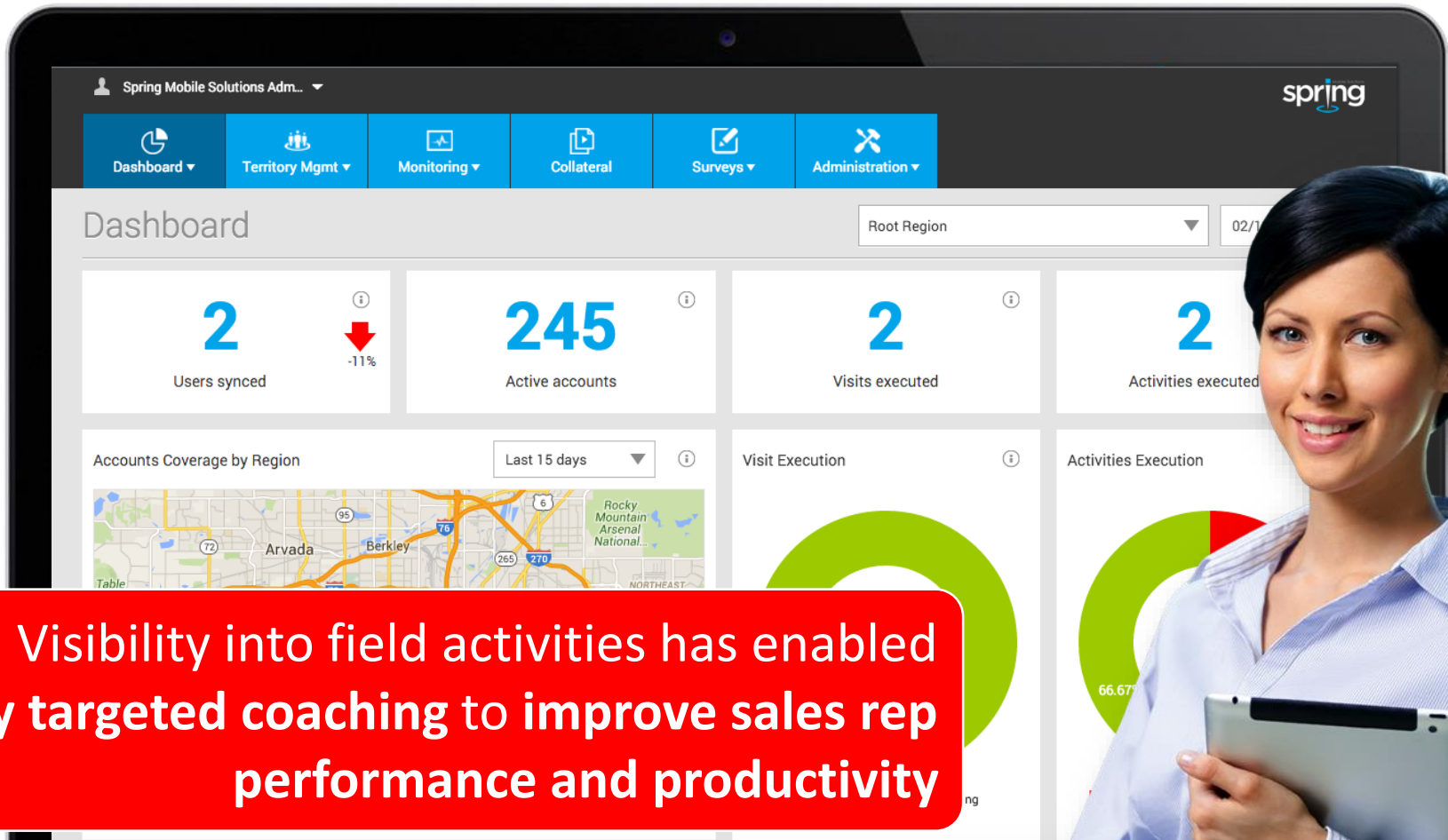
Visibility into field activities has enabled **very targeted coaching** to **improve sales rep performance and productivity**

Insight into executional gaps has **enabled us to improve our business**, which results in **increased revenues**

We are now able to answer key questions and turn them into coaching opportunities

Are our reps visiting the outlets we asked them to visit today and placing their orders on-site?

Are reps hitting their stop times?

How much time is spent in each outlet?

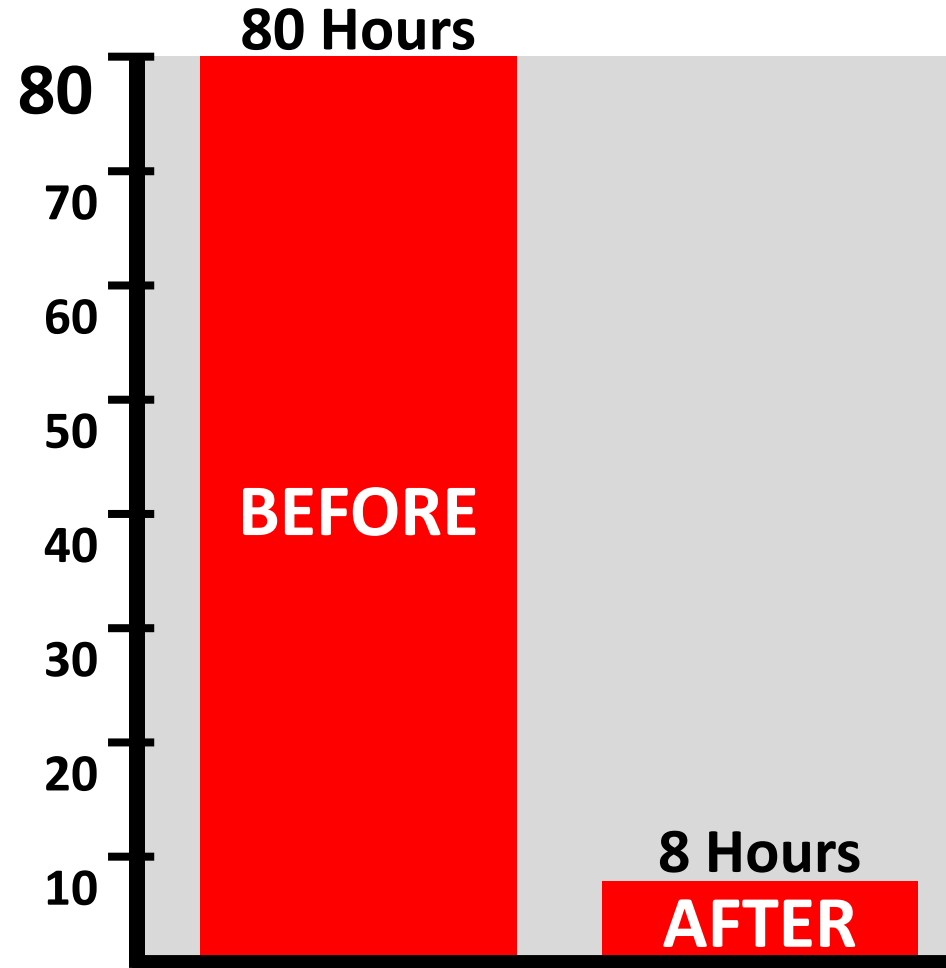What is the strike rate on orders relative to how we have routed our reps?

Of the visits we scheduled, how many are actually generating orders?

Who is leveraging the sales aids?

Promotion Optimization Institute • Spring Summit 2017 • Amsterdam, The Netherlands

Training time has been reduced

Equipment costs have been reduced

EQUIPMENT COSTS

80%

BEFORE

$3,000
PER UNIT

AFTER

$600
PER UNIT

TOTAL SAVINGS $24.2M

Order synch times are significantly less
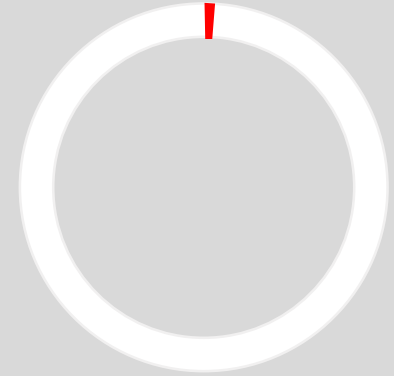
SYNCH TIME
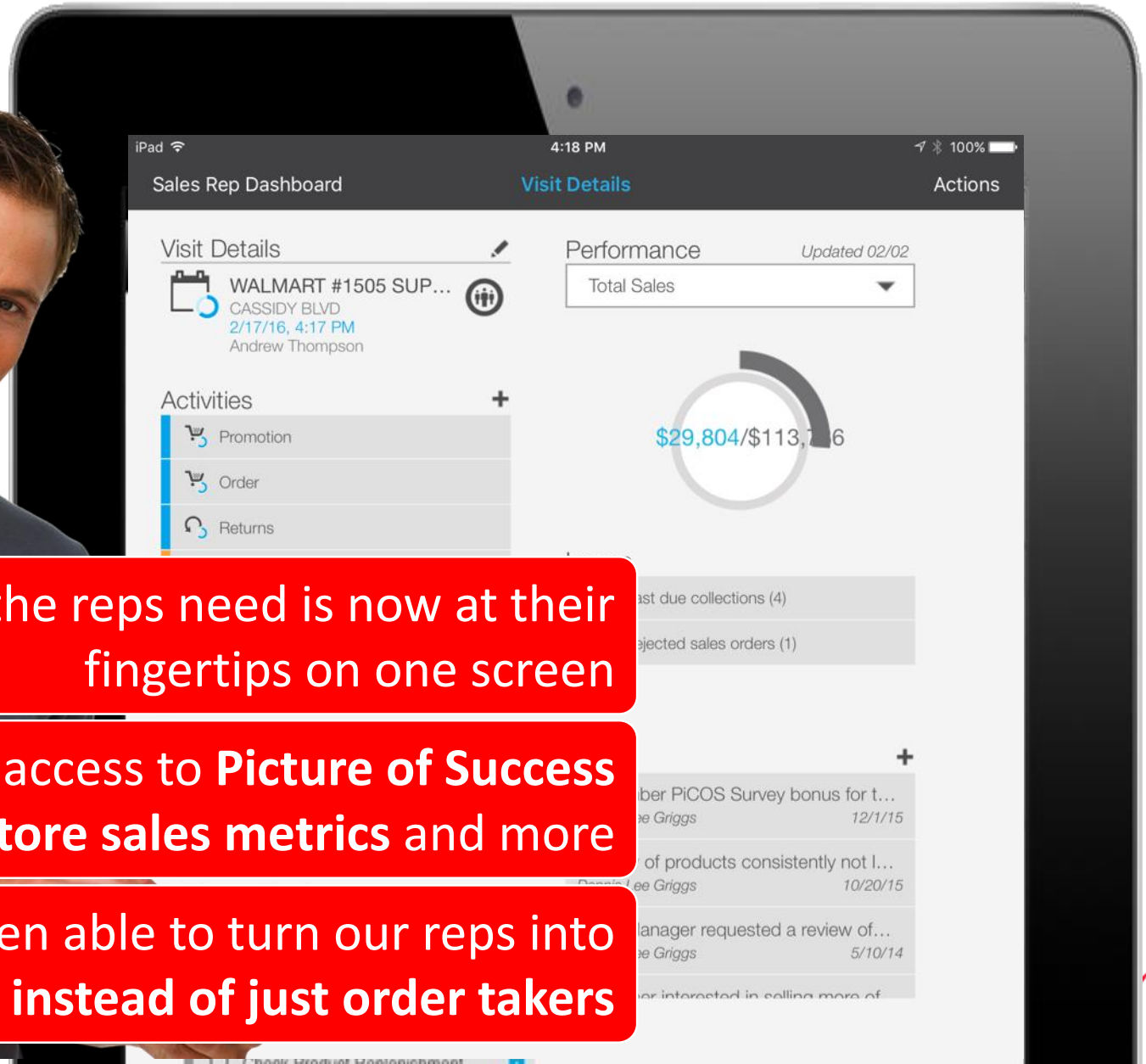
95%

BEFORE	AFTER
~2 HOURS	5-7 MIN

Even more benefits have been realized in the field

Everything the reps need is now at their fingertips on one screen

Reps now have access to **Picture of Success documents**, **store sales metrics** and more

We have been able to turn our reps into **sales people instead of just order takers**

Order entry time has been reduced

ORDER ENTRY TIME

35%

APP SPEED & RESPONSIVENESS

Savings of **9 minutes** per store

INTUITIVE USER INTERFACE

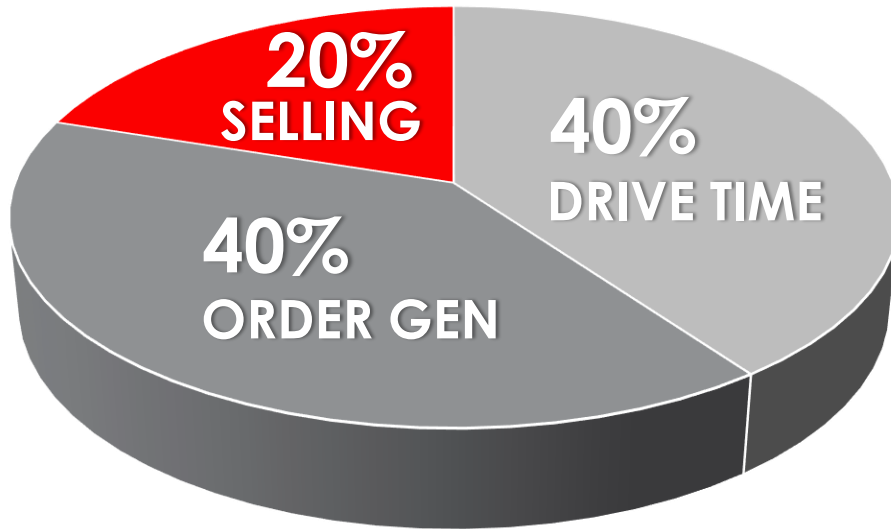Usability of the application has **simplified the process** significantly

SUGGESTED ORDERS

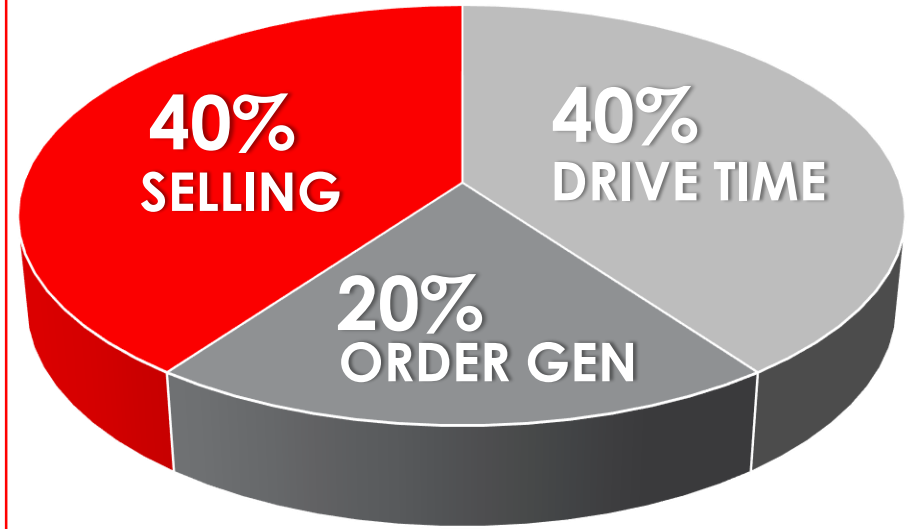Saves reps **1 to 1.5 hours a day** by **auto-creating orders** based on:

Order History
Shop Floor Needs
Back Room Needs

Productivity has increased, resulting in **less order taking** and **more selling**

BEFORE

20% SELLING
40% DRIVE TIME
40% ORDER GEN

AFTER

40% SELLING
40% DRIVE TIME
20% ORDER GEN

■ Selling
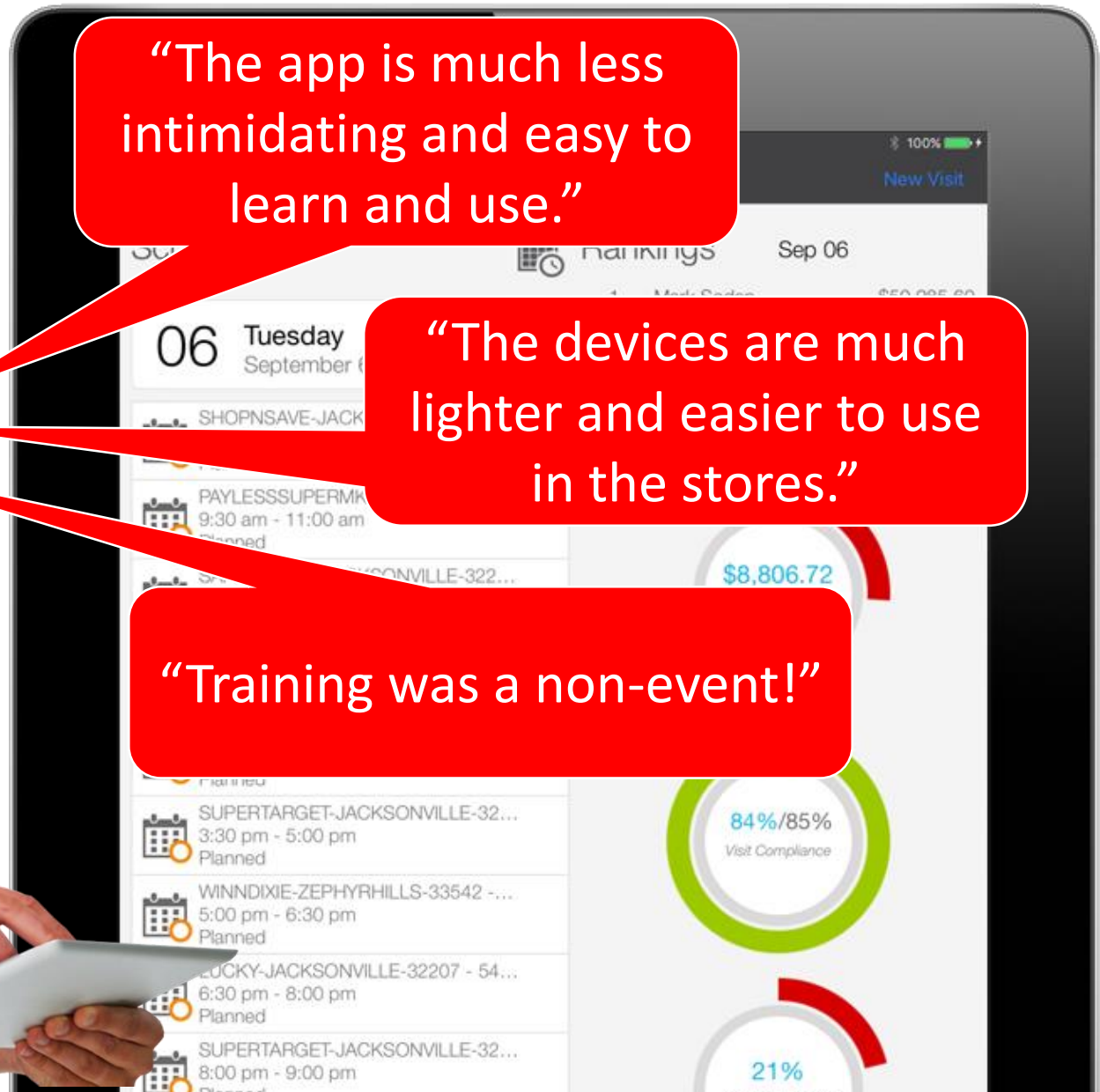■ Order Generation
■ Drive Time

User acceptance is up and change management has been remarkably easy

"The app is much less intimidating and easy to learn and use."

"The devices are much lighter and easier to use in the stores."

"Training was a non-event!"

This is fundamental to our business for revenue growth

Now reps have easy access to business review metrics, such as drain, growth areas, & specific product sales

This has made our reps more consultative

Previously, only 13% of selling tools were being used

Growth acceleration is happening already… only ONE YEAR after vendor selection

Speed of Delivery
(4 Months)

Reduced Order Synch Times

Increased Revenue
(Rep Performance)

Cost Savings
(Equipment & Training)

Less Support Calls
(Ease of Use)