

Case Study

Heinz Automates Retail Audit Process

BlackBerry Devices with Flowfinity Actions Offer Quick IT Deployment



Company: H. J. Heinz is an \$8.5 billion, U.S.-based, global food company that sells products in more than 50 countries.

Industry: Retail/Wholesale

Region: Americas

Company Size: Large Enterprise

Email Environment: Microsoft® Exchange

Type of Solution:

- Business Intelligence, Workflow and Approvals (ERP)
- Field Service, CRM and Dispatch Operations

BlackBerry Partner Solution: Electronic Retail Audit – with Flowfinity Actions by Flowfinity Wireless Inc.

Business Challenge: Heinz wanted a wireless solution to speed up and improve the quality of the score card information they gathered about Heinz brands in retail stores. The existing paper-based system was slow, with considerable lag time between completing a store audit and reporting the findings.

Solution: Heinz worked with its partner Flowfinity Wireless Inc. to create the Electronic Retail Audit. The application, built on the BlackBerry Enterprise Solution™ and using Flowfinity Actions™, wirelessly automates the auditing process on BlackBerry® devices and creates reports pulled from a SQL database.

Results:

- New reporting database
- User-friendly solution in the field
- Support for sales goals
- Centralized approach for IT



The Challenge: Improve Data Collection and Reporting from Store Level

Heinz's U.S. Consumer Products Division is responsible for the success of the Heinz brand in major retail chains and stores. It oversees how products are presented on the shelf to most positively affect sales. In addition to its dedicated sales force, the division also manages third party brokers who ensure products in stores meet criteria set to influence retail sales.

Heinz realized they needed a better way to see into the stores that carried their brands. A small team of Retail Business Managers already audited a sampling of stores to ensure everything was in compliance. The problem was the auditing process was paper-driven and slow to deliver meaningful information to business decision-makers.

In the past, the Retail Business Managers (RBM) audited a store by checking Heinz products aisle-by-aisle and filling out a 50-question paper checklist by hand. The RBM then manually keyed the information into an Excel spreadsheet. Days, and often weeks, passed before the information made its way into a reporting format that could be analyzed by sales executives. If any issues arose, the RBM had to contact the sales manager or broker and set up a meeting.

"We primarily wanted to improve our analytical ability at the store level," says Eric Ginsburg, the project manager for the wireless solution and the Associate Manager for Sales Operations. "We felt if we could see business opportunities as they developed, we could act on them faster, which would increase our overall selling power."

From this thinking, Heinz decided to embark on developing a solution they called the Electronic Retail Audit – a way to wirelessly automate the audit process and generate reports using a SQL database.

Why BlackBerry and Flowfinity?

The BlackBerry Enterprise Solution was already a part of the Heinz corporate culture before this project. "The company was investing a lot on different types of PDAs – we weren't always sure what our staff was using in the field," says Ginsburg. "We liked the BlackBerry Enterprise Solution because it meant we could have a centralized approach to managing the devices and we could also deploy applications."

Their next consideration was speed of deployment. Once they made the decision to move forward, Heinz wanted the quickest path to implement the wireless audit solution. Heinz knew that the BlackBerry Enterprise Server™ enabled with the BlackBerry Mobile Data System™ (BlackBerry MDS™) was a powerful foundation for quickly and securely deploying applications over-the-air. When they found Flowfinity, a BlackBerry Alliance partner, they knew they had a robust approach to creating a viable wireless audit solution.

Flowfinity offers customizable out-of-the-box wireless applications such as Flowfinity Forms and Flowfinity Actions. These solutions allow the immediate deployment of applications without programming; the same is true for the Flowfinity Solutions Platform which allows custom integration without device coding. "We knew Flowfinity Actions had the form collection tool that would work for our auditors in the field, but we needed to do more than just collect the information," says Ginsburg. "We wanted a reporting system at the back end because data is one thing, but you also need to be able to see what the data is telling you."

In addition to supplying Flowfinity Actions to automate the paper-based audits, Flowfinity, with its system integration partner ATSC, took on the role of extending the basic reporting capabilities with deeper customization. They conducted a business analysis of the sales reports needed by Heinz personnel and management. Flowfinity then used Microsoft SQL Server Reporting Services to design a set of flexible reports with multiple parameters that allow users to query data collected with Flowfinity Actions on the BlackBerry.

"Flowfinity was the right way to go for us to get this BlackBerry solution up and running quickly and cost-effectively. We really felt they understood what their solution could do and could help us do it faster," says Ginsburg, whose instincts turned out to be on the mark.

Flowfinity configured the reporting system in about six weeks. For Heinz, this offered a way to streamline the development timeline between their business idea and its rapid deployment to the field.

Partner Profile:



Company: *Flowfinity Wireless Inc.*

- Develops customizable, out-of-the-box solutions that meet the challenge of delivering high usability wireless applications
- Provides out-of-the-box mobile applications that can be deployed without programming to automate mobile data collection, mobile data publishing and field force task management
- Has a growing base of customers in North America and Europe

Featured Product: Flowfinity Actions with Microsoft SQL Server Reporting Services

Business Value:

"Flowfinity was a part of this project from the conception of the idea to the back end implementation we ultimately wanted. They really knew what their solution could do and were extremely responsive to us and what we wanted at every stage."

Eric Ginsburg, *Associate Manager for Sales Operations*

For more information, visit www.flowfinity.com

Building the Sales Reporting System

Better reporting is a fundamental aspect of this solution and a technical challenge for the IT team and Flowfinity. Sales teams at Heinz outlined the kinds of reports they wanted to see to give them better metrics. The current Excel-based approach involved just two reports that could take weeks to generate – far too long to make quick retail decisions. With the Electronic Retail Audit, Heinz gained more than 10 new reports with detailed levels of audit information. And the data would be available almost instantly, because it was being sent directly from the BlackBerry devices to the database.

"The reports were a key performance improvement in this BlackBerry solution," says Ginsburg. "Flowfinity tied the data collected in Flowfinity Actions to nested fields that dropped the information into a set of normalized SQL Server database tables on the back end. That's what makes it so easy for us to pull information into the different kinds of reports we now have."

Another factor in the reporting development process was creating the ability to have ad hoc reports. Even with 10 new reports, Heinz felt that there would be a need for customized information. "Flowfinity put in a hierarchy system that mirrors what we use for our shipments," says Ginsburg. "That means even with the template, you can pick the information you want to see by store, day, region, and even customize the report you want to see it on. We have the capability to pull the information in a thousand different ways with the BlackBerry Solution"

A final criterion for the solution was related to the user-friendliness of the application on BlackBerry devices. RBMs already found BlackBerry devices were easy to learn and valuable for getting email on-the-run. Heinz wanted to ensure that an offline capability was built into the solution for the times when RBMs were out of coverage.

Flowfinity Actions has built in an offline capability so that Electronic Retail Audit information can be entered at the time of an audit, even when a signal is unavailable. The data is cached in the devices until the RBM enters an area where they have a connection. Without intervention from the RBM's, the data is designed to automatically forward to the back end system.

"It was relatively simple to match up everything the Retail Business Managers did with a paper audit, to an electronic format using Flowfinity Actions on BlackBerry devices. And, when we added the reporting component, so we could utilize the data collected from the audits, we knew we had something great."

~ERIC GINSBURG, *Associate Manager of Sales Operations*

Impact on Business and Decision-making

The Electronic Retail Audit makes the auditing process faster, simpler and more user-friendly. Once an RBM completes the audit and clicks submit, the entire process is done. No extra hours are needed in front of a computer at the end of a long day to input data into an Excel spreadsheet; the data is automatically forwarded to the sales reporting database managed by Flowfinity Actions.

Heinz estimates there has been a 10% to 20% increase in the number of audits completed because of the solution. "We've removed all the paper and the data entry," said Ed Bollinger, Director of Retail Operations. "Our RBMs, and in fact anyone in our company who has this on their BlackBerry device, is more willing to participate in the process. For a food manufacturer, this is invaluable because the more knowledge we have, the more we can affect store conditions to benefit our business."

All reports are available on an internal sales reporting web site. The solution has freed up the time sales managers once had to invest in collating the data. "Before if we wanted to measure something, we'd have to dig into our files and build a progress report," says Bollinger. "Even then, I might be able to guess at a number based on what I saw. With the Electronic Retail Audit reports, I can quote to the decimal point how well we are meeting a particular objective."

Ultimately, it's the speed of decision-making that is most affecting Heinz in the marketplace. "The fact that I get 10 reports sent to me every week is amazing," says Bollinger. "I get an accurate picture of exactly how our products are presented to consumers so I can do trend analysis over time. Decision-making flows much easier up the ladder because I can present the numbers that will get people's attention. Ultimately that means we can influence customers in a much deeper and richer way."

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Results:

Speed of Deployment: Heinz used the proven foundation of the BlackBerry Enterprise Solution, Flowfinity Actions and Flowfinity's resources to configure the reporting system. By choosing to go this route, they simplified their own IT requirements and more quickly took the Electronic Retail Audit from the genesis of the idea to full field deployment.

New Reporting Database: Flowfinity tailored a reporting system to the needs of Heinz's sales force within six weeks. The result is a dramatic increase in the number of reports, higher quality data collected in the auditing process, and a way to pull ad hoc reports as needed.

User-friendly Solution in the Field: The Electronic Retail Audit is easy enough for anyone to use, resulting in a 10%-20% increase in audits completed for the company. A built-in offline capability means data can be collected and forwarded even when the user is out of coverage.

Supports Company Goals: Heinz now has a cost-effective system that collects and reports audit data in a way that benefits decision-makers. With quicker, improved access to sales reports, Heinz has gained a way to increase its retail advantage.

For more information on solutions for BlackBerry, visit www.blackberry.com/go/success