



CASE STUDY

Accommodating Your Customers' Ordering Preferences

How convenience store distributor Cooper-Booth uses Handshake to give their customers diverse ordering options.



Understanding the complexities of convenience store reordering.

Founded in 1865, the Cooper-Booth Wholesale Company is celebrating its 150th year in operation. Recognized as one of the Top 20 convenience store (or C-store) wholesalers in the United States, Cooper-Booth's 200 employees pride themselves on working with the top vendors in the FMCG industry, as well as providing strategic value to their customers--convenience store owners and operators.

With annual sales of over \$550 million, Cooper-Booth's full line represents 95% of a convenience store's product needs, selling over 10,000 SKUs including general merchandise and a wide range of food and beverage items. In this incredibly fast-moving, high volume market, Cooper-Booth needed a robust, omnichannel order management solution to simplify a frequent and complex reorder process.

The Reorder Challenge

On average, Cooper-Booth's sales reps visit their customers every one to three weeks. Because these stores are constantly ordering products that move off the shelf very quickly, convenience store operators rarely conduct inventory counts. Instead, they use the reorder process as a kind of inventory check, walking around the store to see which products need to be restocked.

For ten years, Cooper-Booth sales reps were using a Windows PDA device to enter and submit these reorders. The PDA system presented a number of problems. Even at \$1200 for each device, they were often unreliable and didn't allow reps or customers to see order details or product images, making instances of order errors, over-ordering, and returns common.



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Our vision for the customer experience is to have the most hands-free, easy-to-operate order system, because the task of ordering is difficult when it's repetitive. We want the customer to say, 'I ordered efficiently. I received a great confirmation. Everything was in stock, and it arrived on time. It was delivered at the correct temperature and put in the exact place I want it.' That's the vision that we have for every single delivery.

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Jeff Katelan
VP of Sales, Cooper-Booth

Finding a better way for customers and reps to place orders.

When asked to describe a typical store visit, Cooper-Booth's VP of Sales Jeff Katelan explains, "[Sales reps] would go through and scan products, and it would sometimes time out or the battery would die, and then of course everything that was in there was lost. They would have to go and redo everything line by line. The PDA system doesn't even keep a rolling total. There are no pictures. They don't know what their balance is. It's all a mystery until they hit the send button."

The process wasn't much easier for customers who called in their orders. With so many SKUs to reorder (the average Cooper-Booth order is hundreds of line items long), they could spend upwards of an hour on the phone with a Cooper-Booth customer service representative. To improve this customer experience and reduce operating costs, the company decided to find a new system.

4 Key Technology Requirements

In her search for a solution, Lori Homsher, Cooper-Booth's VP of Information Technology, had several requirements. The order management system had to:

1. Allow customers to place reorders through multiple channels: in person with a sales rep, using a native mobile app available offline, or on their own via a web or mobile B2B eCommerce portal.
2. Accommodate scale with thousands of customers (many with individual pricing entitlements), over 10,000 SKUs, and a massive amount of order data.
3. Provide an interactive, intuitive user experience to speed up the reorder process and reduce errors and returns.
4. Give sales reps access to the strategic insights they need to help convenience store operators maximize sell-through with each reorder.



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The key parts of the solution that we were looking for first and foremost was it had to be fast and easy ordering. That was the most important thing, because if we can get the reps in and out quickly and get them to spend less time on ordering, they can focus on more strategic discussions with the customers.

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Lori Homsher
VP of Information Technology,
Cooper-Booth

With an omnichannel platform, customers place orders whenever and wherever they want.

Cooper-Booth needed a system that could do all that, while also being simple enough to implement without any additional IT staff. In the course of her search, Homsher found **Handshake, a B2B Commerce platform provider that encompasses:**

- Handshake Rep, a mobile order writing application used by sales reps in the field.
- Handshake Direct Online, a B2B eCommerce portal that allows customers to place orders 24/7 on the web.
- Handshake Direct Mobile, a native mobile B2B eCommerce application that enables customers to easily place shelf-side and on-the-go orders.
- A centralized web order management hub & integration with backend systems.

The Benefits to Solving the Reorder Challenge with Handshake

Since its implementation, Handshake has been able to successfully meet Cooper-Booth's four technology requirements, bringing omnichannel capabilities, greater scalability, speed, and information access to the reorder process.

1. Omnichannel Ordering

To provide an even easier reorder experience, Cooper-Booth sought to have multiple channels through which those orders could be placed. Homsher's vision for the customer ordering experience was forward-thinking, but simple. She wanted to allow customers to order products through a sales rep, on the web, or on a mobile device--whichever was most convenient for them.

This multi-channel approach is very much in line with where Business-to-Business (B2B) trends are headed. According to a survey conducted by Forrester, 75% of B2B buyers are seeking to make purchases from suppliers with omnichannel capabilities, and

The Handshake Platform



Handshake Rep



Handshake Direct Online



Handshake Direct Mobile



Handshake Hub

Customers place orders wherever and whenever they want.

66% of suppliers are already investing in omnichannel initiatives in response to this demand. ¹

Cooper-Booth first implemented Handshake Rep for their sales team, followed by Handshake Direct Online, a web-based B2B eCommerce portal. After promising initial results, they rolled out Handshake Direct Mobile to ensure they could accommodate their customers' common shelf-side re-ordering workflow. Over 200 customers who once struggled to place orders over the phone now can submit orders on their own time, without the assistance of the Cooper-Booth customer service team.

What's more, the value of these omnichannel customers has increased dramatically since Cooper-Booth implemented the Handshake suite. In 2015, 75% of customers who placed orders via Handshake Direct Online ordered more in 2015 than 2014, with an average 28% increase in total dollars spent.

These numbers are also promising on the mobile side, with a 13% increase in dollars spent in 2015 after only a few months after implementation. These results are directly in line with industry trends. According to a recent study by Forrester, 60% of companies report that their B2B buyers spend more overall when those customers interact with multiple channels.²

2. The Ability to Operate at Scale

As the first of their requirements for a new sales order management solution, scalability was key to Cooper-Booth's ability to do business. According to Homsher, "Scalability was important because of our very, very intense pricing needs with thousands of customers and 10,000 products, and this kind of exponential multiplication of the two. So I needed to make sure that the solution would support that many pricing records as well as increased needs in order volume and users."



"After joining Cooper-Booth, my vision for ordering was to be more order process agnostic...I would love to say, 'we just want your orders. If you want to use the web, that's OK. If you want to have a sales rep write your order, that's OK. If you want to use a handheld ordering device, that's OK too.' We'd like to be able to offer our customers a whole suite of options for ordering and let them choose whatever they like."

Lori Homsher
VP of Information
Technology, Cooper-Booth

An intuitive user interface, quick order duplication, shelf-side ordering, and an image-rich product catalog.

This level of scalability is one of Handshake's major advantages--the ability to support businesses of every size, from individual reps to internationally distributed sales teams. "It is our top priority that Handshake scales up with the businesses of all our customers so that no ifs, ands or buts, our app works first time, every time in the field, no matter how much data you throw at it," says Handshake CEO Glen Coates.

Today, Cooper-Booth's sales reps can find their entire product catalog, customer lists, and customer-specific pricing on their iPads. With Handshake, Cooper-Booth is able to continuously add new users, customers, products, and price lists as their business grows.

3. A Faster, Easier Ordering Process

As outlined earlier, Cooper-Booth customers are ordering products with short shelf lives and high stock turnover. Selling snack items, beverages, groceries, and other food and beverage service products is an enormous challenge, as these items often need to be restocked on a weekly basis. **Handshake has helped Cooper-Booth make this ordering process faster by:**

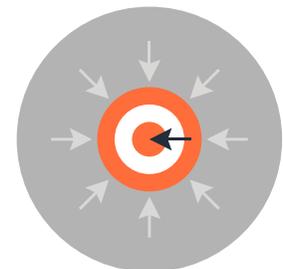
- Providing a simple, intuitive interface across each of their ordering channels.
- Enabling quick duplication and/or modification of past orders.
- Allowing sales reps to walk through the store with the customer, taking inventory and quickly scanning the products that need to be reordered.
- Storing an image-rich product catalog that allows customers to see the exact product they want to buy, preventing them from ordering the incorrect items and **increasing order accuracy by 75%.**

Additionally, in-person reorders that used to take 35 to 40 minutes can now be written within just 15 minutes, giving sales reps more time

With Handshake



28% increase in customer spend.



75% increase in order accuracy.



50-75% increase in order writing speed.

The ideal customer experience accommodates and optimizes for the preferences of the buyer.

to have strategic discussions with customers.

4. Access to Strategic Insight

To provide the best possible service to their customers—especially independent store owners—Cooper-Booth offers a full line of services to help them merchandise their stores and choose top-performing products. According to Katelan, “It’s one thing to deliver products on a day-to-day basis. Pretty much anybody can do that. But we have taken the service side of the business to a different level. We have surrounded our business not with just products, but with additional services and solutions that C-store operators need.”

Sales reps use Handshake to see customer order history and analyze what a store is buying in order to improve the store’s assortment and increase turnover. They can then access regional sales data, lists of top selling items, etc. on their iPads to educate store operators about key insights like consumer purchase behavior and product rankings.

“We can say to the operator, ‘We’ve got five items here that Handshake is not showing as being a top five item. Let’s remove those and add the correct products.’ That’s the power of having all this information at your fingertips,” says Katelan.

Conclusion

With hundreds of customers now placing omnichannel orders, Cooper-Booth is well on their way to achieving their vision for the ideal customer experience, one that accommodates and optimizes for the preferences of their buyers. And as the desire for native mobile commerce continues to grow in the consumer space, it comes as no surprise that Cooper-Booth continues to see growing adoption of Handshake Direct Mobile, their mobile B2B eCommerce application.



“I have sales reps that range from 25 to 60, and you can only imagine the difference. I’ve got a 25-year-old that doesn’t even need any training on Handshake, but even to my 60-year-old who’s been selling for us for 30 years the training is so easy. Their ability to grasp how to use it, how to train a customer, and put it all together literally takes half an hour.”

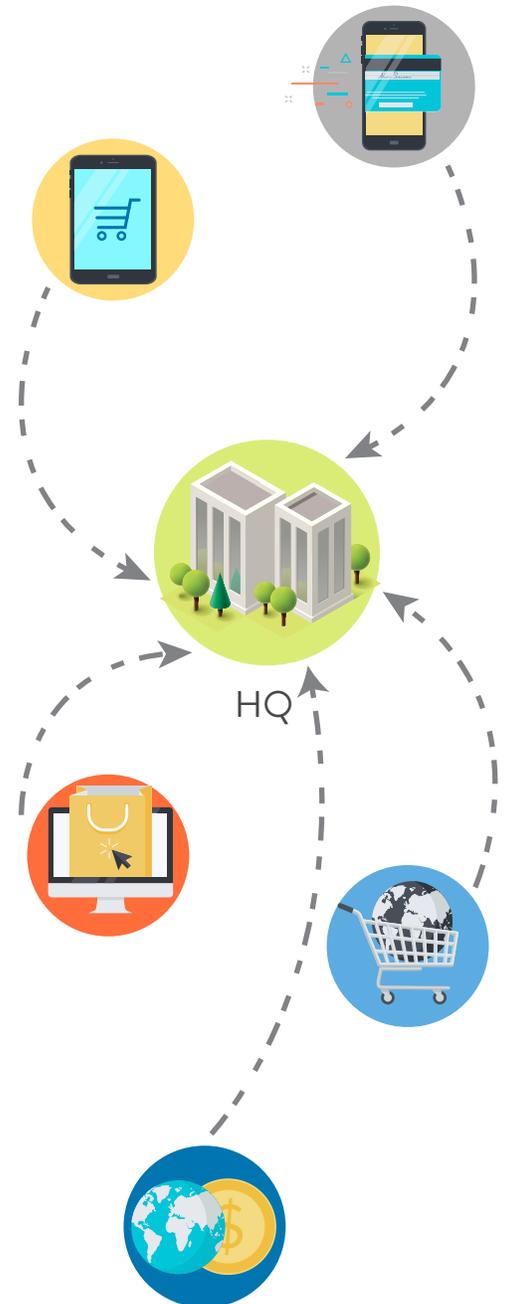
Jeff Katelan
VP of Sales, Cooper-Booth

Hundreds of customers placing omnichannel orders.

In addition to many of these customer facing changes, Cooper-Booth has experienced significant back office improvements as well. Training a new sales rep at Cooper-Booth no longer requires IT intervention and takes minutes. Calls to the back office for pricing, inventory, and product information have been greatly reduced, and the dramatic increase in order accuracy has made for more seamless order fulfillment.

Want to learn more about how Handshake can help your business implement an omnichannel ordering suite and transform the way you can serve your customers? Contact us today.

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1 https://www.accenture.com/us-en/~/_media/Accenture/Conversion-Assets/DotCom/Documents/Global/PDF/Dualpub_1/Accenture-Building-omnichannel-Commerce-Platform-Future.pdf

2 http://blogs.forrester.com/andy_hoar/15-04-02-us_b2b_ecommerce_to_reach_11_trillion_by_2020