

Creating a Strategic Vision

The Challenge

A highly successful and growing franchise business had some significant challenges. Having recently upgraded their ERP solution there was no appetite for replacing it, yet it did not have any automation. A trade only web site existed that allowed customers to place sales orders, but this was not integrated. Orders had to be keyed into the ERP system manually, then a printed copy scanned and emailed to the franchisee that would deliver the goods. Once delivered, the franchisee would invoice their franchisor with agreed charge rates for the stock used, and would send the signed document as proof of delivery. The franchisor would then pay the franchisee for the delivery, and would raise an invoice to charge the customer, and would post it to them with the proof of delivery.

This was a growing sales channel and was set to double in size over the next 3 to 5 years. A technology solution was required urgently to address this, or else operating costs would need to double also.

The Solution

A vision was created of a mobile tablet-based system that franchisees could use to trade with their own customers as well as handling these trade deliveries—one that integrated with the franchisor ERP system for products and pricing, and to their own accounting systems to update sales, stock and payments information. The web site would be integrated with the ERP system, which in turn would integrate with the franchisee mobile solution, so that orders placed on the web could be recorded in the ERP system, and then passed to the corresponding franchisee to deliver the goods without any manual intervention. A signature would be captured on the tablet when the order was delivered, and the mobile system would produce an invoice to charge the franchisor together with the proof of delivery, and both documents would be emailed to the franchisor. The documents would be automatically filed away in a document store. The delivery would be recorded against the order in the ERP system and would wait for invoicing. When invoices were processed, the ERP system would look up the proof of delivery from the document store and attach it to the invoice, PDF them both and email them to the customer.

Highlights:

- Existing systems used where possible.
- Minimised risk approach, focused on ROI.
- Transition plan handling old and new processes simultaneously.
- Automation targets achieved in full.

“The entire process is automated and is administered by the same number of staff we had at the outset. All we do now is manage exceptions.”

The strategy was adopted, and due to it being high risk was split into benefit-focused stages to manage return on investment.

