ITK Success Story

Profile by Sanford helps customers change their lives by changing their nutrition with programs designed by physician's from Sanford Health.

Executive Summary

Profile by Sanford was experiencing solid growth along with growing pains managing inventory, running effective discounting programs, and leveraging data to provide insights throughout the organization.

In The Know
Solutions Group

Process first. Technology second.

Challenges

Questions Profile by Sanford was asking…

- How can we run promotions and see real results?
- How can we track if customers are getting results?
- Are customers showing up for appointments?
- How can we supercharge our loyalty program to see who customers have referred - and connect family members (when applicable) in the system?
- How can we ship to customers without doing it manually?
- How can we scale up without the wheels coming off?
- How can we continue to grow without becoming impersonal?

Profile by Sanford needed technology that could grow as fast as they are. They needed a superior, integrated ERP system for Retail. A system that could bridge the gap between business intelligence gathered from coaches working with people's fitness goals and with products client's were purchasing or not purchasing. Profile wanted realtime access to inventory. And they wanted an ERP system that worked well out of the box and didn't require significant modifica;ons. They also wanted a system that was simple and scalable so it could be taught, used and truly leveraged by franchisees.

ITK Success Story

Solutions

- Microsoft D365 (Cloud Solution)
- Integrated ERP, POS and CRM solution (with few exceptions)
- Secure Financials for each Franchise - Provided shared data throughout the company and a wall of privacy to exist so franchises could share inventory data without sharing financial data with other franchisees
- ITK Solutions Group worked closely with two other partners (Stoneridge - Project Management, Financials and Tech, Datasync Solutions - CRM, ITK - Overall Retail vision and business process experience, plus POS implementation, support with Project Management

"We can't and should not celebrate our technology, the only thing worth celebrating is the success you have with our technology."
- Satya Nadella

Results

- Hit 6 month Go Live Date within two weeks
- Improved Customer Experience, improved and longer relationships with coaches thanks to customer loyalty program and 360-degree view of data
    - o Shared data from inventory and financials to customer records to coaches
    - o Coaches truly understand what their clients are going through (which clients are buying or not buying products, when someone hits their goals/milestones to congratulate them)
- Data leveraged to Improve Customer Retention (& improve Marketing Messaging)
    - o Insights into indicators of who might be in danger of dropping off (not hitting their goals, not buying product or attending coaching meetings) so they can be reengaged
    - o What's the average weight loss, fall off rate, best success stories (all great information for Marketing purposes)
    - o All this info could be captured in excel but is virtually unusable unless it can be aggregated and seen from an overall perspective
- Real -me POS Inventory updates
    - o Optimize food inventory, what's selling, what is not
    - o Maintain freshness and avoid waste
    - o Ensure availability without si7ng on excess stock
- Quarterly Retail Audit Reports
    - o Reconcile sales on a daily basis
    - o Visibility into Inventory, Promotions, Client drop offs, Staff effectiveness
    - o Improved Security - Logs every ac-on an operator makes
- Track Effectiveness of Sales and Discounts
    - o Visibility into all sales and discounts
    - o What's working and what's not
    - o With older system you had to override prices manually so no tracking
- Created a powerful Loyalty Program
    - o Provides a way for customers to be introduced to other products
    - o Better serve customers with discounts
    - o Discounts as reminders to stay engaged and discourage lapsing
    - o Tool to make coaches jobs easier
    - o Tool to enable shared learning throughout the organization

The ROI Story

- **On time** - we hit the six-month milestone within two weeks
- **Lower budget** - we implemented at a relatively early stage with 25-30 stores meaning a simpler, quicker implementation
- **Scalable** - by implementing a system with enterprise level features, Profile by Sanford can both grow faster and go through fewer growing pains. They can scale to virtually any size without outgrowing their system or reimplementing. The system can expand as they do whether it's number of stores, number of franchisers, or number of legal entities.

What's Next

(Features coming to D365)
- Additional Shipping features
- Labor Management (summer 2017 feature)
- Additional Features for Receipts

itk In The Know Solutions Group

Process first. Technology second.

Manufacturing Industry Inventory Optimization Success Story

Executive Summary

A manufacturing client's inventory was "out of control" in their own words. They were holding $18 Million worth of safety stock or extra inventory. That's WAY too much. When we dug deeper we realized that the folks in charge of inventory didn't know inventory best practices or how to get AX to make inventory management easier.

CUSTOMER BACKGROUND
- $750 MM International oil and gas manufacturing company
- Initial Dynamics AX implementation was in 2013/2014
- Was transitioning from using Dynamics AX in some facilities to all 14 service centers

CHALLENGES
Client's primary challenge was that inventory was "out of control" in their own words. They were holding $18 Million worth of safety stock or extra inventory. That's WAY too much. When we dug deeper we realized that the folks in charge of inventory didn't know inventory best practices or how to get AX to make inventory management easier.

SOLUTION:
- Addressed the business process issues
- Brought Supply Chain team up to speed on the basics of inventory management
- Set-up AX to help manage the inventory
- Showed the client team how to use the software to automatically optimize inventory going forward

RESULTS
- Went from holding $18 Million worth of materials in inventory to $1 Million (not a typo)
- Basic set-up for customers and vendors used to take half of a day - we showed them how to get it done in three minutes

KEY TAKEAWAYS
- We live in a new world, companies don't just need help setting up software
- They need help making sure their underlying business processes are in line with industry best practices
- Consultants need to know industry best practices for business processes AND how to use the software to solve customers' day to day challenges
- Satya Nadella said it best, "This isn't just about technology – it's what you do with it."