



## PROFILE BY SANFORD SUCCESS STORY

### How D365 + ITK Can Transform Retail

[www.itksolutionsgroup.com](http://www.itksolutionsgroup.com)

#### **About Profile by Sanford:**

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

#### **Executive Summary:**

Profile by Sanford was experiencing solid growth along with growing pains regarding 360-degree tracking of member's progress, running effective discounting programs, leveraging data to provide insights throughout the organization...all while servicing their growing membership with an even more personal touch.



# CHALLENGES

## Questions Profile by Sanford was asking...

- How can we track if members are getting results?
- Are members showing up for appointments?
- How can we run promotions and see real results?
- 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 members 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 members' fitness goals and with products members are purchasing or not purchasing.* Profile by Sanford wanted *real-time access to inventory.* And they wanted *an ERP system that worked well out of the box and didn't require significant modifications.* They also wanted *a system that was simple and scalable, so it could be taught, used and truly leveraged by franchisees.*

## 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

### **An Integrated Team**

- ITK Solutions Group worked closely with two other partners (Stoneridge - Project Management, Financials and Tech, Datasync Solutions - CRM, ITK Solutions Group - Overall Retail vision and business process experience, plus POS implementation.)

## RESULTS

- Hit six month Go Live Date within two weeks
- Coaches have sight lines into members' behaviors and actions improving the member experience, powered by 360 view of data
- Insights from data is helping coaches avoid drop offs and identify success stories
- Real -time POS Inventory updates
- Data provides insights into discounting usage and results
- Overall Visibility into Financial KPIs

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

## TRANSFORMING RETAIL: A CLOSER LOOK

- *Insights from data is helping coaches avoid drop offs, identify success stories leveraged to Improve)*
  - 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
  - What's the average weight loss, fall off rate, best success stories (all great information for Marketing purposes)
  - All this info could be captured in excel but is virtually unusable unless it can be aggregated and seen from an overall perspective
- *Coaches have sight lines into members' behaviors and actions improving the member experience, powered by 360 view of data*
  - Shared data from inventory, financials, member purchases and coaching sessions
  - 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)
- *Real-time POS Inventory updates*
  - Optimize food inventory, what's selling, what is not
  - Maintain freshness and avoid waste
  - Ensure availability without sitting on excess stock
- *Data provides insights into discounting usage and results*
  - Visibility into all sales and discounts
  - What's working and what's not
  - With older system you had to override prices manually so no tracking
- *Overall Visibility into Financial KPIs*
  - Reconcile sales on a daily basis
  - Visibility into Inventory, Promotions, Client drop offs, Staff effectiveness
  - Improved Security - Logs every action an operator makes

## PROJECT IMPACT & FUTURE VISION

- **On time** - we hit the six-month milestone within two weeks
- **Improved Speed to ROI** – we used a simplified implementation methodology we call the ITK Template Approach to provide for a faster, streamlined engagement
- **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 re-implementing. The system can expand as they do whether it's number of stores, number of franchisers, or number of legal entities.

There are other software integrators, but not very many that both know tech AND how to use it to solve your business problems. We know how to do that because we've held senior Retail positions, where we actually used the software in the real-world. And, because we're business process experts.

To find out how ITK can help get your systems and business silos sharing information so you can make more informed decisions, contact [info@itksolutionsgroup.com](mailto:info@itksolutionsgroup.com).