

CASE STUDY

Review and delivery of a mobility and CRM solution for retail sales representatives

In the fast moving world of Consumer Packaged Goods (CPG) being in tune with consumer needs and aligning the online or in stores experience to those needs is essential to drive growth and profitability.

Increasingly Enterprise Resource Planning (ERP) platforms are being adopted across the Consumer Packaged Goods sector. The combination of integrated data and analytics brings significantly more insight into consumer behaviours, back office and front line performance across marketing, category management and brand building; to customer collaboration; to supply chain and logistics; and to sales, retail execution and eCommerce. The power of big data and analytics has global reach and organisations can align their business, finance, IT and digital strategies to balance the drivers of operational business with the consumer and optimise your business around them.

The main benefits of Berkeley's involvement were their structure and methodical approach, professional project management skills, and their ability to drive collaboration across many parties. Good folk! Happy to have fun and enjoy the project and happy to admit when things were not good and put things right quickly.

VP Global Shopper & Customer Marketing

One of the world's largest consumer goods companies was seeking to create a single, integrated mobility and Customer Relationship Management (CRM) solution for use during quality inspection store visits by the retail sales force across Europe. The Sales & Merchandising field force already used mobile solutions for their store visits however the processes and systems were varied and also many were reaching end of life. A single technology solution based on SAP (CRM & Rex) alongside Apple (iPad) technologies was selected which would increase productivity of reps, reduce costs, and help standardise best practice.

Setting up for success

The CRM implementation encountered a number of challenges at the outset as the despite being familiar with mobile platforms the technology was a significant step change and the move from disparate systems to an integrated solution required substantial changes to working practices including data management and communication.

Berkeley were asked to review the project to help get it better set up for success.

An Assurance Framework

The Berkeley team applied an assurance framework which through a combination of desktop review, interview and observation conducted by a small team of high calibre consultants, assessed the health of core areas essential for successful transformation. (see Figure 1).

Alongside internal stakeholders from the business and technical teams key suppliers were also included in the review. This re-enforced the view that effective partnering

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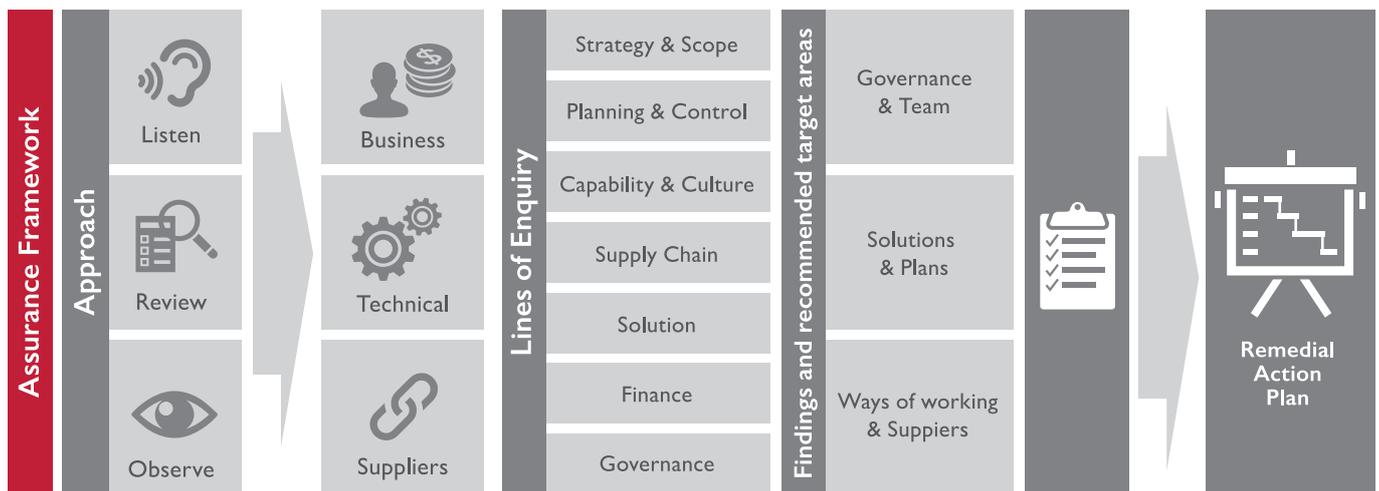
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with the supply chain is a key to success and added another dimension of context rather than purely a client-side perspective.

Another effective method which enabled the Berkeley review team to gain genuine insight rather than a censored view was to join BAU meetings and observe the resources in informal environments.

The review team made observations about good practice across all review areas and then identified key target areas for an improvement plan: Governance and Team; Solutions and Plans; Ways of Working & Suppliers (see Figure 2).

Figure 1 – Assurance Framework



The right foundation for delivery

Assurance reviews at regular intervals such as key decision points and /or stages e.g. Initiation, Contract Award, Start of build, Handover and Close enable the key stakeholders to confirm that the capability and benefits of the change will be provided.

Transformational change quite often is novel to the client business and as such internal resource do not necessarily possess the skills to comprehensively shape the change and allow the change to be accepted. Review by an independent body acting as a critical friend to the client organisation empowers the business to lay the right foundation for delivery.

Working alongside the leading consumer goods company the Berkeley review team agreed resolutions for all items and the

success of both the output of the review and engagement with the business leadership resulted in us being asked to take on overall programme management leadership for the first release. The first release of the project was successfully delivered to the revised plan and budget for three countries.

This included training and deployment of the solution to over 300 sales representatives and support staff. This significantly improved the efficiency and capability of these teams, and resulted in very positive business feedback.

Following the successful delivery of Release One the project was handed over to an internal project manager a reflection of the strength of the foundations laid and sustainable improvements implemented.

Figure 2 – Target areas for improvement

Governance and Team	<ul style="list-style-type: none"> Design and agree and staff a new team and work-stream structure Identify and fill gaps in that target organisation structure Refresh Business Design Authority (agree people, role, time commitment) 	<ul style="list-style-type: none"> Design, agree and implement revised governance arrangements Agree and document impact of the Programme approach
Solution and Plans	<ul style="list-style-type: none"> Baseline list of known functional gaps/issues, agree which are material now (Blueprint-level) versus later (Design-level), Activate change control Develop comprehensive 'bottom up' project plans (all work-streams present; deliverables, resources, dependencies 	<ul style="list-style-type: none"> defined) with roles, responsibility & accountability for delivery clear Build checkpoints into those plans to re-confirm solutions & supplier choices Approve revised plans and budgets with stakeholders.
Ways of Working & Suppliers	<ul style="list-style-type: none"> Agree strengthened PMO arrangements and documents Agree and implement all required project collaboration and dev tools 	<ul style="list-style-type: none"> Agree key principles of revised commercial approach with the System Integrator (SI) put in place revised contracts / SoW's on that basis. Consider putting in place short-term interim arrangements to buy time to do that properly