



# MiT System's Case Study - Claire Rose

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## Leading Beer Distributor Improves Driver Productivity with MiT Systems' Windows Mobile-based Solutions

*A leading wholesale distributor for several leading U.S. beer suppliers, Clare Rose serves over 5,000 businesses. The company began using handheld computing devices in 1981, and began investigating solutions that would help meet emerging supplier requirements in 2003. By complimenting a sales force automation solution from MiT Systems, Inc., a Microsoft Certified Partner, with inventory management software from MiT, the company saw an immediate reduction of the rate of product loss between manufacture and point of sale, more efficient forecasting, a reduction of overtime, increased worker efficiency, daily sales increases, and annual cost savings of more than U.S. \$100K.*

From its beginnings in 1936 as a small soda water distributing firm, Clare Rose, which is still privately held, has grown to be one of the top wholesale distributors for several leading U.S. beer suppliers. Its customers include over 5,000 businesses in New York's Suffolk and Nassau counties, including supermarkets, gas stations, convenience stores, bars, restaurants, and country clubs.

In 1981, the company first began using handheld computing devices with small screens along with briefcase printers, which continued in use for many years. Then, in 2003, driven by the need to capture additional information and meet the added requirements of new mandates from its suppliers, Clare Rose began investigating alternative solutions that would help extend the company's previous investments in Microsoft technology solutions.

Among the new supplier requirements, Clare Rose drivers needed the ability to routinely survey customer displays and taps. In addition, the company wanted the ability to track sales objective executions created on a host computer and then synchronized with a Panasonic Toughbook running on Microsoft Windows XP PC Edition. Moreover, Clare Rose wanted to better equip its driver salesmen to service customers. The driver salesmen conduct several activities at the customer sites, including inventory, sales and delivery, merchandising, and surveys, so maximizing their efficiency was a highly important objective.

To meet these challenges, the company began using MiTEzSales Mobile®, a sales force automation solution designed for Windows Mobile® and available from MiT Systems, Inc., a Microsoft Certified Partner, one of the more than 9,000 Windows Mobile partners that together deliver over 18,000 applications for the Windows Mobile platform. The MiTEzSales Mobile® solution runs on Panasonic Toughbook devices and helps Clare Rose driver salesmen to service the company's customers, make sales, generate invoices in the field, and credit returns. Because the solution is based on Windows Mobile technology, it delivers familiar, intuitive programs and productivity tools that help Clare Rose's driver salesmen work more efficiently while mobile.

More recently, in order to compliment the automated MiTEzSales Mobile® sales process, executives at Clare Rose began looking for a more efficient way to monitor and manage inventory while creating audit trails and implementing accountability for drivers' daily inventories. The company's previous warehouse counting process was cumbersome, time-consuming, and prone to inaccuracy, which translated to poor product forecasting. In addition, there was an unacceptable rate of product loss between manufacture and point of sale, which the company needed to reduce in order to increase profit margins.

**“The MiT System has helped us enhance our operation by increasing the accuracy of our vehicle check-ins and check-outs and speeding up The process of counting our vehicle inventories and warehouse inventories.”**

**Gary Neumen**  
CIO  
Clare Rose, Inc.

### Solution Overview



**Customer Size:** 221 employees

#### Business Situation

Clare Rose, a top wholesale distributor for leading U.S. beer suppliers, services over 5,000 businesses in New York. The company first began using handheld computing devices in 1981, and, in 2003, investigating solutions that would help meet emerging supplier requirements. Recently the company approached MiT Systems, Inc., a Microsoft Certified Partner, to implement a more efficient way to monitor and manage inventory while creating audit trails and improving driver accountability.

#### Solution

By incorporating inventory management software with an earlier sales force automation solution designed for Windows Mobile by MiT, combined with a ruggedized device from Symbol/Motorola, the ROI on the new software and hardware were realized in less than a year. Clare Rose saw a reduction of the rate of product loss between manufacture and point of sale, more efficient forecasting and workers, a reduction of overtime, daily sales increases, and an annual cost savings of more than \$100K.

#### Benefits

By keeping them connected to vital data when mobile, the MiT solutions based on Windows Mobile® are helping Clare Rose employees respond and collaborate more effectively with customers, partners, and suppliers. Clare Rose saw an immediate reduction of the rate of product loss between manufacture and point of sale. Driver load back percentage has decreased, which has resulted in daily sales increases and annual cost savings of more than U.S. \$100K.



# Mobile Solutions Drive Efficiencies at Claire Rose

## Improved Inventory Management using Modern, Easy-to-use and Administer Mobile Technology

When Clare Rose began the evaluation process of searching for an ISV to provide them with a sales force automation solution, many factors came into play. The ISV needed to have experience and intimate knowledge of the consumer packaged goods industry as well as distribution best practices, modern technology which was easy to use and administer, and a solution that was configurable to provide a customized look and feel. MiT met all of these requirements and surpassed the competitive offerings of other ISVs that did not have Windows Mobile-based, developed applications.

With MiT on board as the vendor of choice, Clare Rose focused next on selecting hardware that would be best suited for the harsh warehouse environment. MiT recommended a highly ruggedized device from Symbol/Motorola, the MC9090, one of the more than 140 devices built by 48 device manufacturers that run on the Windows Mobile operating system and provide ease-of-use and increased productivity. VIPER™ inventory management software designed for Windows Mobile by MiT runs on the MC9090 devices, which are used by Clare Rose warehouse personnel.

With the collaborative effort of the customer, MiT was able to complete and fully deploy the new solution within 90 days of the date when the contract was signed. The pre-planning phase and statement of work occupied approximately one month before the contract was executed. This step was critical to ensure the project specifications and customer requirements were explicitly detailed in order to avoid any roadblocks along the way.

With the capability to send and receive data in real-time, the MiTEzSales Mobile® solution, used by the driver salesmen, and the VIPER™ inventory management software, used by warehouse personnel, provides Clare Rose with the ability to do the following:

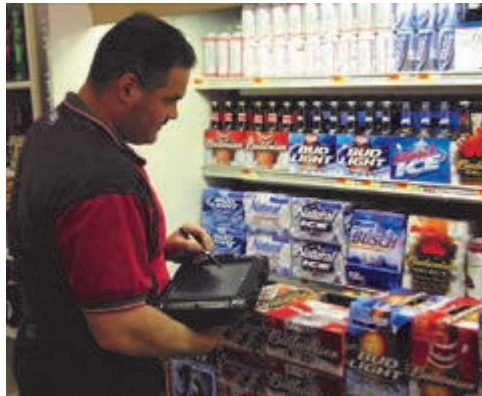
- Place and fill on-site orders
- Track sales quotas dynamically
- Generate invoices and collect payments
- Capture signatures and scan barcodes
- Track deliveries and monitor inventory levels by store location
- Credit returns and schedule deliveries
- Access sales history, customer promotions, and work orders
- Conduct surveys and capture sign requests
- Support merchandising, asset tracking, and DEXing



## Windows Mobile Solution Helps Increase Daily Sales, Improves Forecasting

The MiT Systems solutions based on Windows Mobile are helping Clare Rose employees respond and collaborate more effectively with customers, partners, and suppliers by keeping them connected to vital data when mobile. Much like the benefits of the mobile sales force automation solution, MiTEzSales Mobile®, the ROI on both the VIPER™ software and hardware were realized in less than a year.

After the deployment of the new solution, which builds on Clare Rose's existing IT infrastructure, the customer saw an immediate reduction of the rate of product loss between manufacture and point of sale, more efficient forecasting, a reduction of overtime, and an increase in worker efficiency. Driver load back percentage, the percentage of inventory that is returned to the warehouse at the end of the day, has decreased, which has resulted in daily sales increases and annual cost savings of more than U.S. \$100K.



Before the deployment of its mobile computing solution, Clare Rose driver salesmen had to complete surveys on paper and then bring those surveys back to the office to be recorded into the company's database by another person. Now, surveys are completed electronically in the field, which eliminates double entry of information. In addition, the accuracy of the surveys has increased because the information is being entered once.

Today, MiT software running on the Panasonic Toughbook and Motorola MC9090 devices compliment one another very well to equip Clare Rose's driver salesmen with the information they need to make decisions that both support organizational objectives and increase customer satisfaction. The driver salesmen unquestionably like the new mobile computing systems and appreciate the amount of information available to them. The driver's believe that the mobile devices help make them look more professional and would not consider taking their old handheld devices back. **Also see case study at Microsoft's site:**

[http://www.microsoft.com/casestudies/Case\\_Study\\_Detail.aspx?casestudyid=4000004122](http://www.microsoft.com/casestudies/Case_Study_Detail.aspx?casestudyid=4000004122)