



**HANDSHAKE**



CASE STUDY

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# Automating the B2B Ordering Process: The Key to Scalable Growth

How leading spice manufacturer Spicely Organics digitized B2B sales and ordering to support their rapidly growing business.

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# Scaling businesses simply can't afford the costs associated with manual sales and ordering processes.

For any growing manufacturer or distributor, there comes a point when manual sales and ordering processes are no longer practical. The costs associated with Excel or paper order forms and orders placed via fax, phone, and email—from errors and backorders to mis-shipments and customer dissatisfaction, are costs that scaling businesses simply can't afford.

At this inflection point, suppliers often begin a search for technology that can streamline and automate the manual processes bogging them down. Some businesses choose to focus on field sales efficiency, providing sales reps with order writing tools that minimize errors and speed up shipping and fulfillment. For others, customer demand for online ordering makes B2B eCommerce the top priority.

A third category of businesses, however, invest in multi-channel selling platforms from the start. These companies recognize the power and flexibility of implementing a platform that merges their field sales and customer ordering channels and connects to their backend ERP system through one integration point. This not only solves the back office challenges of fragmented order data coming in from disparate sources, it also gives customers the flexibility and choice of ordering through a rep, a website, or a mobile app.

One such business is Spicely Organics, a comprehensive organic, gluten-free, vegan spice line known for their eco-friendly packaging and in-store displays. Since their start in 2002, Spicely Organics has seen major demand for their high-quality but well-priced line. They are currently the #1 organic spice brand in Northern California, found in nearly every Whole Foods Market in the state.

By 2016, it was clear that Spicely Organics' sales and ordering processes were unable to keep pace with growth, and this led them to automate their rep and customer ordering functions with Handshake's full platform. This case study details the growth-related challenges Spicely Organics experienced before Handshake, the considerations they balanced when looking for the right solution, and the results they've seen since implementation.

## Multi-channel selling platforms include:



Mobile order writing apps for sales reps



Online ordering on the web for customers



Mobile ordering apps for customers

# Spicely Organics' merchandisers, rather than sales reps, are the key players in their sales process.

## The Spicely Organics Sales Operation & The Importance of Merchandising

Selling items with a small physical presence, barely two inches tall, the Spicely Organics sales process is somewhat unique. Early on, they discovered the importance of creating an in-store display that would showcase their product line in a visual and eye-catching way. For this reason, Spicely Organics' merchandisers, rather than sales reps, are the key players in their sales process.

Typically, new accounts are opened by the Sales Team at headquarters, but merchandisers service stores on a regular basis. About half of Spicely Organics' nearly 1000 customers receive merchandising support in-store. Local accounts are serviced by in-house merchandisers, with remaining stores serviced by a network of third-party merchandisers.

According to Vanessa Bonner, Director of Merchandising Services:

“The merchandiser is the one who is in the store. They're placing and packing out the orders. Customers rely on us to be the product experts and order appropriately.”

Merchandisers photograph the display, count the number of items that are remaining in each slot and place orders to replenish inventory on a frequent basis. Explains Bonner: “Our spice line is very fast moving, and we have to keep the racks filled to capacity, especially in high volume stores.”

Spicely Organics' merchandising process evolved partially out of necessity, as high inventory turnover can make managing the display overwhelming for the store. Where it might take a store an hour to place an order, Spicely Organics merchandisers can do it in half the time.

## Spicely Organics' customer base:



Spicely Organics' customer base is currently evenly split between those served by merchandisers, and those who self-serve.

**As the company scales, the self-serve segment is growing rapidly, and online ordering is a key component of helping them expand their reach.**

# The Handshake platform had potential to optimize both Spicely Organics' full-serve and self-serve channels.

## Pre-Handshake: A Manual Merchandising Process

Before Handshake, merchandisers had to complete several manual steps to submit an order to headquarters. Third party merchandisers had to submit an order through a separate hub, export the order, convert it into a CSV file, and then upload this document into a clunky Netsuite extension that had been custom-built to handle Spicely Organics' B2B orders.

The process was even more manual for internal merchandisers, who would write orders on a paper order form and then re-enter them into CSVs or directly into the custom ordering portal. Not only was the portal lacking in performance, with long load times and issues with accidental order duplication, it was also quite rudimentary. There was no way to double check that CSV data was accurate until several steps after upload, and a lack of images made it difficult to confirm that products were correct. Human errors were also common both at the transfer point from paper to CSV and when entering data directly into Netsuite.

With up to 250 items on display, it could take up to 20 minutes for a merchandiser to write an order, and another 20 minutes to re-enter the data, wasting time and money.

"I've known we needed some kind of automated order intake system since I started the job in 2011," explains Bonner. "We would see other companies with handheld devices or laptops and hardwired scanners, and I always felt there was a solution out there that would be right for us."

"But it was a big investment for us," she continues. "We were looking at solutions through Netsuite partners, but they weren't fitting the bill. It either had too many features, was too complex, or we couldn't afford it. Other options just gave you the ability to create an Excel file and upload in onto a smartphone."



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**Vanessa Bonner**  
Director of Merchandising Services

# A solution that offered both web and mobile ordering to customers was top priority.

It wasn't until they encountered a Handshake rep at the annual Fancy Foods Show that Spicely Organics found the exact solution they were looking for. From that initial conversation, it was clear that Handshake was a solution that had huge potential to optimize the merchandising arm of the business, while at the same time offering online ordering for their self-serve customers.

## The Decision: Doing It Right the First Time

When choosing a sales and ordering solution for their business, Spicely Organics was looking to invest in a comprehensive solution that would set them up for success in the coming years. **This motivated Spicely Organics' adoption of Handshake's entire platform, including:**

- **Handshake Rep:** a mobile app their merchandisers would use to quickly place orders at store visits.
- **Handshake Direct Online:** a website for their customers to place orders from a computer.
- **Handshake Direct Mobile:** an app for their customers to place orders from smartphones and tablets.

According to Bonner, the decision was clear. "We knew we needed to go all or nothing. Let's do this; let's commit to using technology. Let's take that leap and manage our growth and the traffic that's coming through our order entry system, since we get it from all channels."

The decision was also one of survival in terms of operational efficiency and even employee retention. "If we didn't make some kind of technological leap when we did, it was going to severely affect us in the future," explains Bonner. "Just at the rate we were growing. Over the last 2 years, we've added over 300 customers. Growing at that rate, employee satisfaction was my #1 priority. In today's workforce, if you aren't providing the best tools possible to your staff, you'll lose them to a company who makes it easier to do their job."

## The Full Handshake Platform:



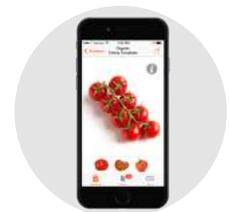
### Handshake Rep:

A mobile app for B2B field reps/merchandisers



### Handshake Direct Online:

A website for B2B customer ordering



### Handshake Direct Mobile:

A website for B2B customer ordering

# Spicely Organics saw results within weeks of their Handshake implementation.

A solution that offered both web and mobile ordering to their customers was also a priority, as the self-serve arm of the business was growing most rapidly. Spicely Organics wanted these self-serve accounts to be able to order from the device of their choice and remove any friction from the ordering process.

They also saw a strong, multi-channel customer ordering solution as a way to attract new accounts.

## Rolling Out Handshake: Starting with the Merchandisers

Facing a huge operational burden from their manual ordering process in the field, Spicely Organics chose to roll out Handshake Rep to their merchandisers for an immediate impact on their business. They saw results within weeks of implementation. Explains Bonner:

“Now with Handshake, we’re saving the company money, and we’re saving the employee time spent on a manual task. We’re seeing such a huge impact on the merchandiser side. They’re able to place their orders right at the rack—it’s brilliant.”

Since using Handshake, the time a merchandiser spends on customer has been cut in half, allowing them to visit more stores in a day. Most of this time savings has been due to the elimination of repetitive data entry, and the team is able to make better use of the time spent in stores.

Says Bonner:

“As a manager of a labor force, you really look at how much time your reps are spending doing different kinds of tasks. What I want my reps to be doing is talking to store managers, making the display look beautiful, and filling it to capacity. I don’t want them spending their time writing down an order and transferring it to another system.”

## The Merchandising Channel: Results



### Operational cost savings:

Less data entry,  
less order errors



### Faster order writing:

Cut in half, so merchandisers can  
see more customers in a day



### Better sales appointments:

Less time doing manual order entry,  
more time talking to store  
managers and managing the display

# The Spicely Organics Sales Team has found online ordering to be a key value proposition when pitching new accounts.

## Up Next: Online Customer Ordering

Given the success Spicely Organics has had with their merchandising team, they are anxious to roll out Handshake's online customer ordering solutions for similar cost-cutting and efficiency benefits. Nearly half of Spicely Organics' customer base falls in the self-serve category, and this segment is growing rapidly. These accounts currently send in orders manually via phone, email, and even fax.

"Once we get our customers using Handshake, there will be a huge time savings in our internal order processing department," says Bonner. "Currently, we have to have several people translate and re-enter these orders."

What's more, the Spicely Organics Sales Team has found online customer ordering to be a key value proposition when pitching new accounts. According to Bonner, "we just opened up new self-serve accounts in Texas and New Mexico, with Handshake marketing materials included in our sales presentation. They're ready to jump on board!"

If you're looking to do a one-time implementation of a B2B sales and ordering platform to support your scaling business, contact Handshake today.

Email: [info@handshake.com](mailto:info@handshake.com)  
US Toll Free: +1 (855) 532-9044  
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