

Anderson Merchandisers use forecasting and quoting tools to accelerate service configuration.

THE CLIENT

Anderson Merchandisers is a retail service provider who stocks, organizes, and completes other tasks within retailer stores for a variety of clients. As a Walmart Preferred Service Provider, manufacturers and distributors around the world entrust Anderson Merchandisers with promoting their consumer goods on Walmart shelves and enhancing the customer retail experience.

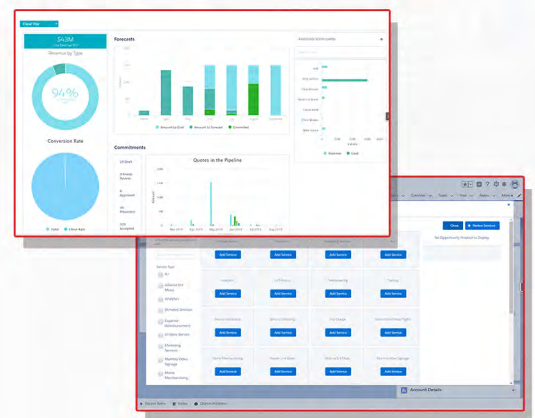
THE CHALLENGE

With responsibility for stocking Walmart stores all over the country and thousands of employees to coordinate, Anderson Merchandisers was looking for a system that could help keep their business process organized and forecast their staffing needs as they scale. The Salesforce CRM provided a cloud-based solution to organize their data, but Anderson needed a deeper level of customization to account for their unique, service-based opportunities that often involved multiple clients.

THE SOLUTION

Taking into account Anderson Merchandisers' unique business processes, Rosetree Solutions designed a custom application tailored to the user experience within Salesforce. The first step is an interface that allows for logging and customization of service opportunities. These opportunities require a multitude of variable inputs with several dependencies. With this easy-to-use guided process, users can consistently, efficiently, and accurately price services.

The forecasting section allows Anderson Merchandisers to automatically calculate the number of people and hours of labor required for the services scheduled, as well as expected revenue. The company can now be better prepared for upcoming staffing needs and scheduling opportunities. (continued on next page)



"Rosetree was able to quickly understand our business processes and offered solutions that met our goals and exceeded expectations."

Chris Caraway
Director-Business Management,
Anderson Merchandisers



(continued from previous page) The final section is a quoting application for the services Anderson is providing. Since many of these services include placing products from multiple clients, a service can be broken up by percentages and then sent out with an auto-generated contract via DocuSign integration. Once the opportunity is closed, the data is moved into a proprietary ERP system Anderson has for further resource scheduling.

THE RESULTS

Anderson Merchandisers' business process was streamlined and organized through a custom application in Salesforce. Additionally, a custom Salesforce dashboard offers high-level data visualizations to monitor the status of opportunities and forecast labor, providing insight into day to day activities, and operations at a whole. Where much of this information was previously handled in spreadsheets or with manual calculation, now automation and a custom user interface make the services easy to organize, quote, and deliver in the store, all in less time and with less error.

ABOUT ROSETREE SOLUTIONS

Rosetree Solutions is a Salesforce and Skuid consulting firm that works with clients looking for progressive cloud solutions that create positive organizational change.

As App Innovation Partners, Rosetree Solutions began creating industry-specific solutions on the Salesforce platform. Consulting services shortly followed, and Rosetree now offers end-to-end solutions for clients from initial implementation, to ongoing consulting, and custom development. Customer success is our primary focus, providing solutions you can count on.

"Our company now has real-time reporting on revenue and labor forecasting to help us make intelligent and timely business decisions."

Chris Caraway
Director - Business Management,
Anderson Merchandisers

time saved in quoting process

75%



ROSETREE
SOLUTIONS, LLC

IMPLEMENTATION | CONSULTING | DEVELOPMENT

Salesforce Solutions You Can Count On.

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