NORTH STATE GROCERY, INC.

Customer

North State Grocery Inc

Partner

SkyLite Systems Inc.

Products and Services

Microsoft Flow
Microsoft PowerApps
Office 365
SharePoint Online

Industry

Retailers

Organization Size

Large (1,000 - 9,999 employees)

Country

United States

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Grocery chain in California and Oregon boosts customer relationships with custom app

September 14, 2018

One of the highest priorities for North State Grocery is keeping customers happy at both of its chains. When a popular customer service program became a bottleneck for responding to customer requests for new products, the customer service team worked with SkyLite Systems to replace it. The new solution unlocks customer data from Microsoft SharePoint Online—a familiar tool for the staff—making it possible for all

stakeholder departments to access and update the database from any connected device. It also helps keep data and alerts moving smoothly, preventing requests from falling through the cracks—all while increasing the value of Office 365 and the company's Microsoft investment.

" This tool makes managing the customer relationship much easier. Now we know that nothing is going to fall through the cracks."

—Lynn Martinusen: Customer Service Manager
—North State Grocery

Holiday Market and SAV•MOR Foods, the two formats that comprise the North State Grocery regional grocery retail organization, operate in an extremely margin-sensitive, competitive industry. With limited square footage and big competitors in the northern California market, it's critical for these operations to be highly customer focused. That's why the stores rely heavily on strong customer service to attract and retain loyal customers—in the store, at the point of purchase, via email, and on social media.

One way the stores cater to their customers is by using shelf signage to solicit suggestions for new products. "You can call us, and we'll do our best to bring in any item that's available and feasible for us to carry. We've always received great reviews from customers for working with them to stock products that are important to them," says Lynn Martinusen, Customer Service Manager at North State Grocery.

Programs like this are more critical than ever to grocery retailers. "With natural and organic products expanding exponentially, it's hard to keep up, "says Martinusen. "There are many new and niche products. Buyers meet with vendors and manufacturers who are presenting new products all the time."

For North State, stocking new products in small spaces is an even bigger challenge. "We don't always have the largest stores in our communities," says Martinusen. "We don't have the shelf space to bring in every item from every manufacturer. And we don't like to discontinue a product to make room for a new item, only to have to discontinue the new item a few months

later. So, we rely on our customers to tell us what they want to see in our stores."

A multifunctional tool

The North State customer request program has been around for 28 years. Until recently, the company's small customer service staff used a Microsoft Access database to manage the program. Over the years, however, responding to customer requests and managing follow-up with buyers, customers, and managers became a daunting challenge.

The previous system for managing new product requests required a significant amount of manual intervention by the customer service staff of four who were using it. "We needed help managing the database," says Martinusen. "It was all on our shoulders to find products, wait for the buyer schematic to determine shelf space, and alert managers about the need to follow through with customers at the store level and make sure nothing fell through the cracks. It was a huge responsibility."

Going forward, North State needed a solution that would enable staff in multiple departments at multiple locations to respond to new product requests and get products on shelves. "The old system just wasn't conducive to having everyone work with the program. Instead, it was a bottleneck," Martinusen continues.

Martinusen and her team turned to SkyLite Systems, a member of the Microsoft Partner Network, for help designing a new platform for managing the program. Beginning with a sketch on paper illustrating the company's requirements, the SkyLite team set out to create a

customized Microsoft SharePoint Online list form using Microsoft PowerApps to track new product requests. The customized PowerApps list form ties in data from an existing customer database already in use with another SharePoint custom app. "North State needed a tool that's easy to change and easy to use," says Dave Chennault, Cofounder of SkyLite Systems. "Because North State had adopted Office 365, it already had

everything it needed. And because this solution uses a PowerApps custom form with a SharePoint list, there was no training needed."

SharePoint is a familiar tool for North State Grocery staff. Nontechnical customer service staff were able to build reports using lists in SharePoint to identify requests needing attention. With more than 20 SharePoint list views, the customer service team can quickly take control and build metrics and reports that help them manage the process without special training or consulting services.

All customer requests are stored in SharePoint lists. Users access the request using familiar SharePoint list views with an integrated custom PowerApps form when they view request details. The app also leverages 11 automated flows, created using Microsoft Flow, with email alerts sent to all stakeholders in the life cycle of a new product request—including buyers, store managers, assistant managers, and, of course, customer service. "This spreads the workflow and decision making to staff who are directly responsible for ensuring that the request is satisfied," says Chennault. "It also eliminates the old bottleneck caused by the limited user base. The current count is more than 50 users across all locations and growing."

The solution was developed in about 10 days, after which the North State customer service team worked with it, learning and changing it along the way, then rolling it out to the buyers. "At that point, we were able to respond to some buyer concerns and add some quick edit functionality to make it more user friendly," says Martinusen.
"Once that was done, we developed a manual and started training." The team presented a training video at the launch meeting with store managers, which was then uploaded to the North State Grocery SharePoint site. Employees use the tool to manage a database of nearly 300,000 customer records and more than 1,200 items, with a minimum of 50 new requests coming in every week.

Microsoft Flow solution

Because the solution is tied in with SharePoint, it's easy for the team to process requests. "When managers and buyers get requests now, they can make changes using the SharePoint Quick Edit list view—it looks just like a

spreadsheet," says Chennault. "They love SharePoint because it can create a lot of different views to display product status—whether it's pending, approved, denied, seasonal, or complete." SharePoint uses tailored list views that managers can access to manage the database and keep customers apprised about when a product is in stock.

The tool's deep integration with Microsoft Outlook and Microsoft Flow make it quick and easy to manage the process. Using Microsoft Flow, SkyLite created and automated flows to facilitate review, followup, and customer feedback—from a customer request to putting a product on the store shelf. "The 11 flows behind this app help ensure that tasks are completed. Customers receive feedback in a timely way, so things don't fall through the cracks," says Chennault. "It's critical for maintaining and improving customer loyalty and satisfaction—and success for North State Grocery."

With the solution, managers can quickly and easily search the entire database of nearly 300,000 customer records stored in another SharePoint list in another SharePoint app. The SharePoint customer list is populated nightly from a legacy system using a batch job. "Managers can filter by name, by store, or by status," says Martinusen. "So, they can give customers an answer immediately at their store."

Improved stocking and service

The new customer request program has now been deployed throughout the North State organization. "It's a very popular program with our customers," says Martinusen. "We continually get rave reviews for our customer follow-through at our 800 number and on Yelp and Facebook."

The new solution is also a significant time saver. "PowerApps has created a way for us to easily share important information about customer requests for new products with our stores and senior management staff," says Martinusen, who estimates an actual time savings of at least 15 minutes per customer contact. "There's no middleman to go through," she continues. "The store manager can immediately see the status, relay it to the customer, and take any steps needed to ensure the product is delivered—or click a button to send an email to a buyer for assistance. In the past, an email to a buyer would take a

few minutes to draft. With the PowerApps button, we can accomplish that in an instant."

It's a big hit with employees, too. "At first, our buyers and assistant managers weren't happy about taking on another aspect of customer service, but it's so much more manageable for everyone."

This solution takes advantage of the company's Office 365 subscription, and no additional software was required. Using SharePoint with PowerApps and Microsoft Flow means North State is able to make the most of its investment in Office 365, increase the value of its Microsoft relationship, and improve customer satisfaction without buying new software or supporting a new platform.

Find out more about North State Grocery (https://shophqf.com/) on Facebook (https://www.facebook.com/holidaymarkets) and LinkedIn (https://www.linkedin.com/company/north-state-grocery-inc./) .

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