WSWA NextGen Summit

2022

22nd

Industry References
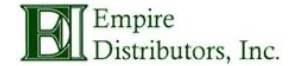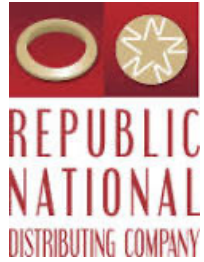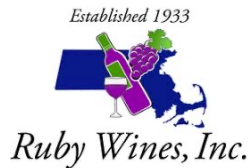
About Inventiv Software

Specialize in Software Beverage Alcohol Wholesalers

Sales Rep Software	Sales Manager Software	Driver and Warehouse Software

PA — Sales Reps - Order entry with sales history and pricing

PA+ — Sales Reps - Order Confirmations, Surveys, Order Approvals

DO — Sales Rep - Will Call Deliveries

PA+ — Sales Managers – Sample and Pickup Approval

EIS — Sales Managers – Reporting, Deals Module

RM — Sales Managers – Plan territory changes in a consistent way
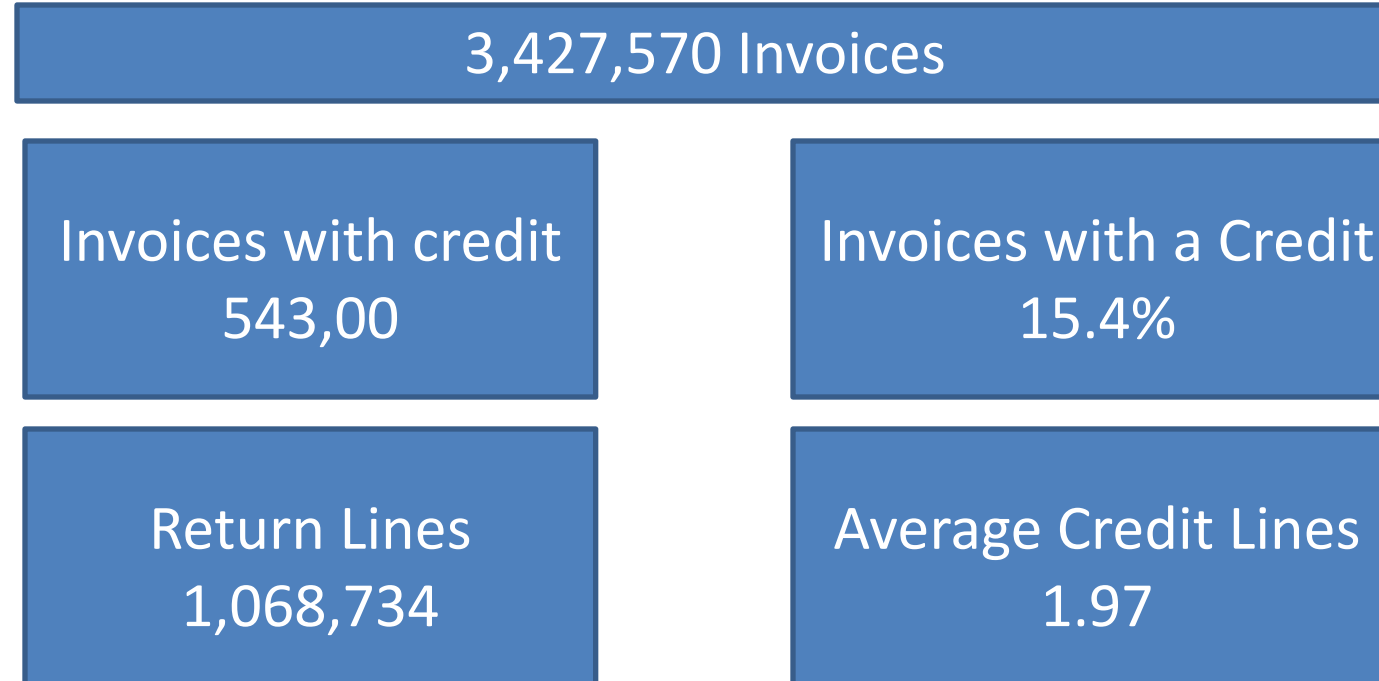
PD DRIVER — Drivers – Edit Orders, Collect Payments and Print Clean Invoices

PD DOCK — Warehouse Staff – Driver Management

Customer & Supplier eCommerce Software

3
Industry Software Trends

#1 - Driver Delivery Software is a Requirement

3,427,570 Invoices

Invoices with credit 543,00	Invoices with a Credit 15.4%
Return Lines 1,068,734	Average Credit Lines 1.97

PocketDelivery Process

Driver Leaves Warehouse

- iPhone
- Printer
- Paper

Driver Meets Customer

No More Credits

Driver Completes Delivery

No Need to Scan Invoices

Sales Rep and Warehouse Notifications

Fast Check In

Returns and Payment Data

End of Day Check
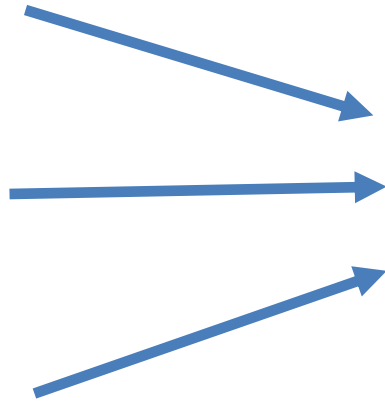
Delivery Notifications
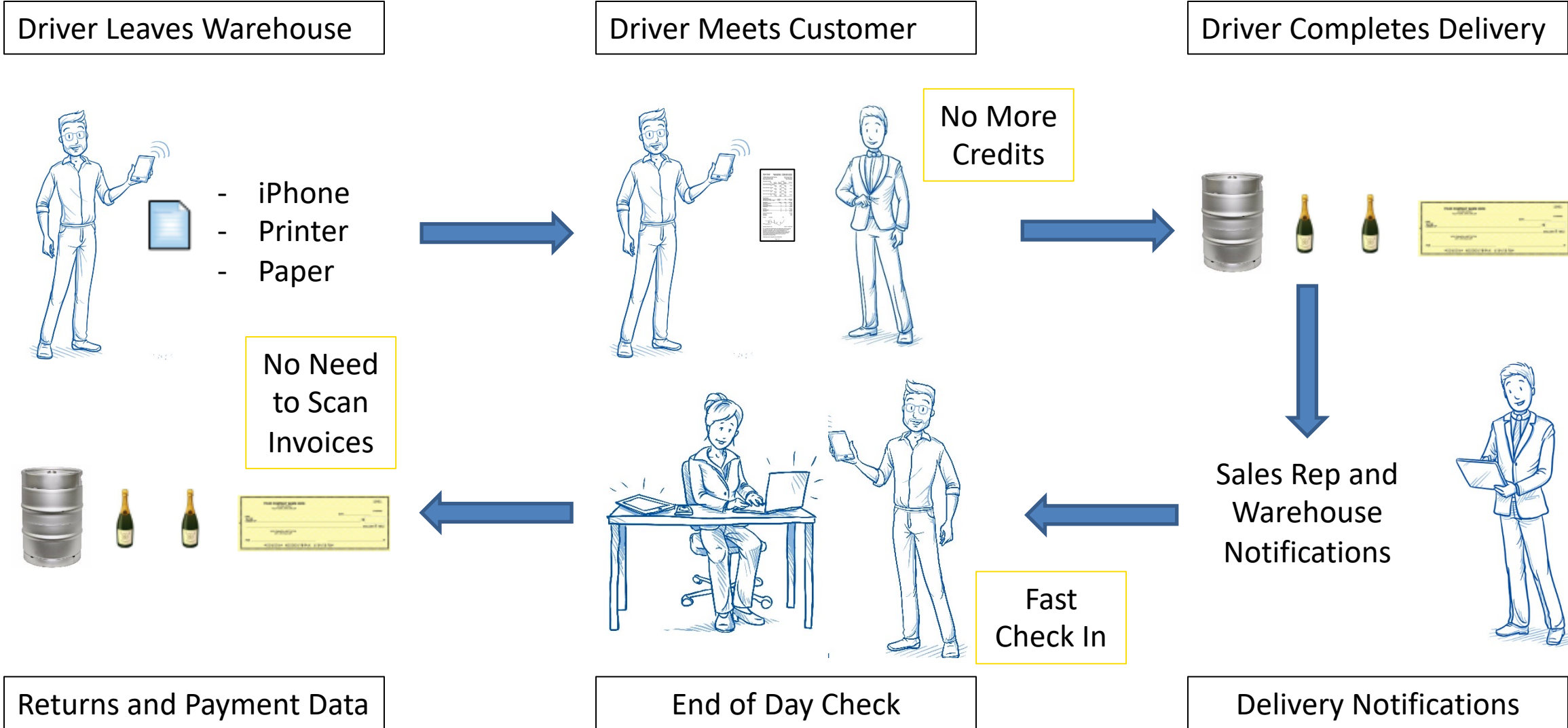
Questions?

Will the number of credits go down?

What is the value of a clean invoice to the customer?

Is there a lot of change management by department?

#2 – eCommerce Order Volume Increases

Sales Reps Receiving More Electronic Orders

Wholesaler Website

Marketplace Website

provi

SevenFifty

ERP

Customers are Moving to eCommerce

More Customers are Now House Accounts

OrderLink

Corks Wine And Spirits

Kirby Wines & Liquors

Busters Liquor

Orders

Sales Rep

Customer Service

ERP
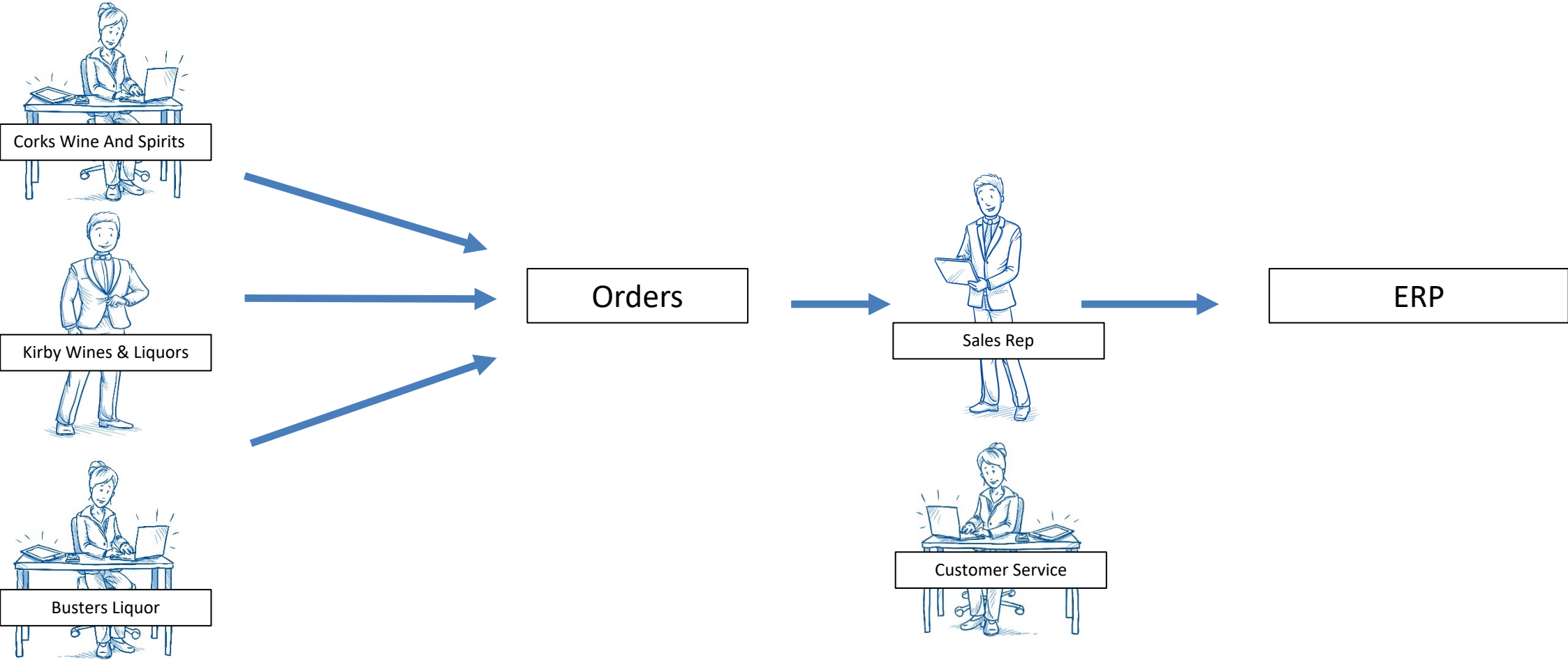
The One Place Your Reps Receive All Their Electronic Orders

Questions?

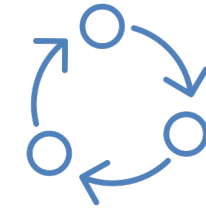What about orders that come in at the end of the day?

What if we have multiple reps calling on the customer?

How is the customer notified of the order status?

#3 - The Digital Transformation of the Industry is Here

Customer Experience

Wholesaler Operations

eCommerce

Sales

Drivers

Office Staff

Marketing

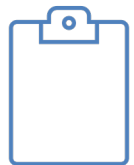# 6-8 Weeks...

....or the 90 Day Fog

PocketProfiles

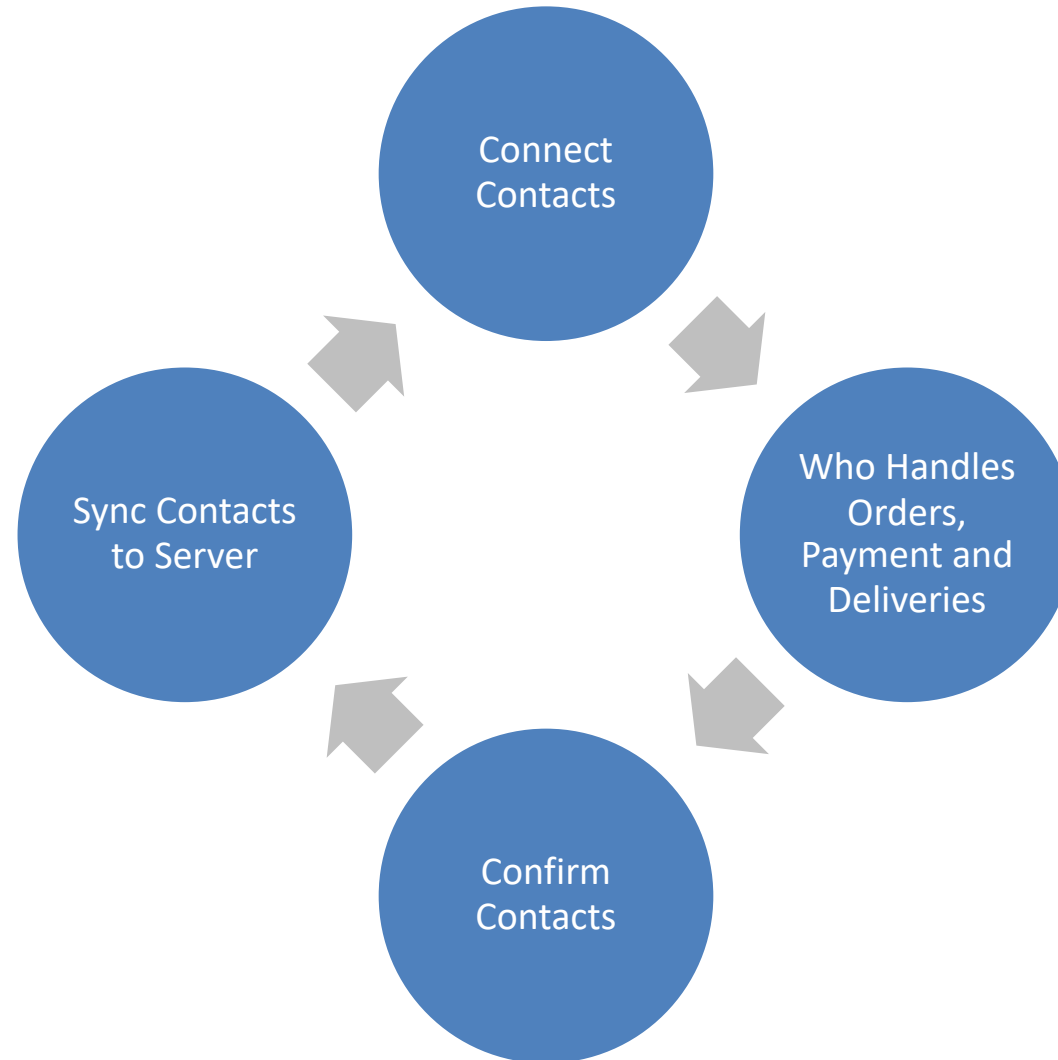**Contacts** – Who are the key people and who handles orders, payments and deliveries?

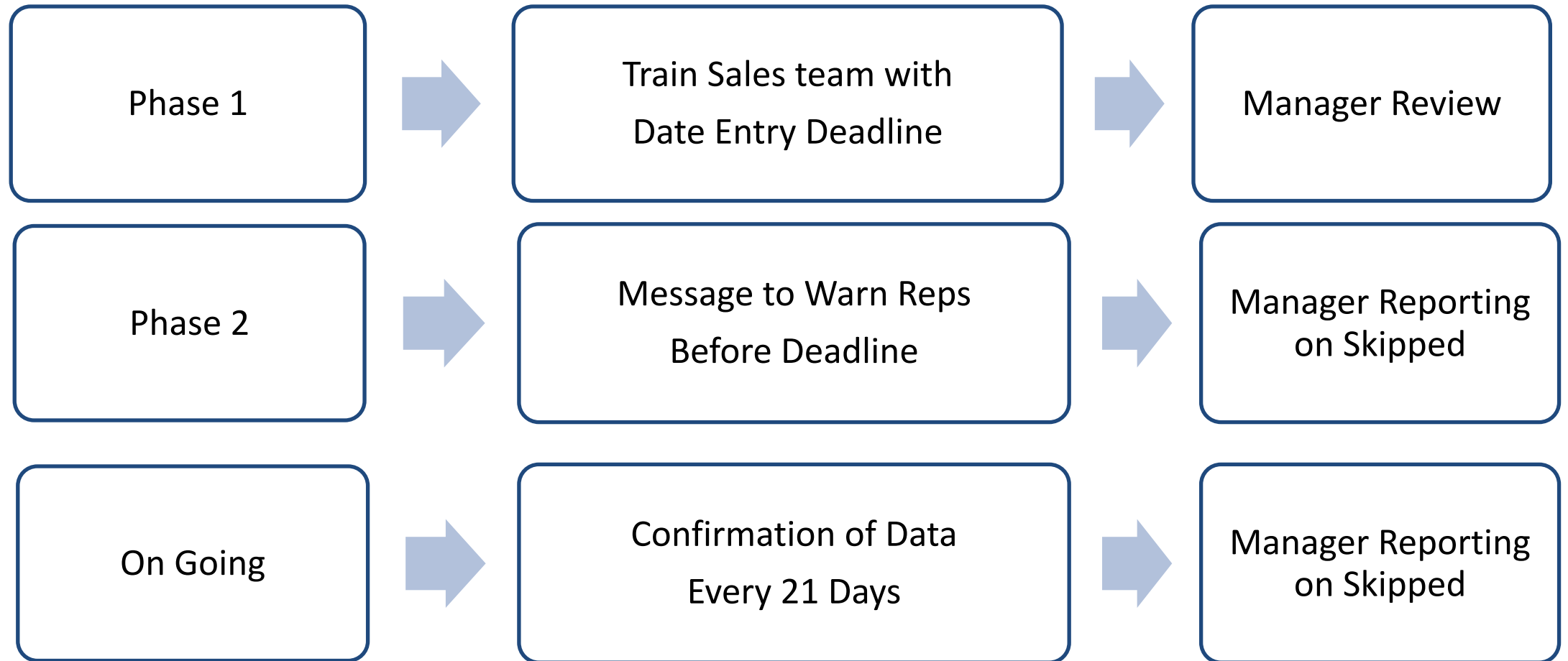**Calendar** – When is a customer called on and what time of call is it, Visit, Phone or Zoom?

Attributes – What are the customers buying preferences on and off premise?

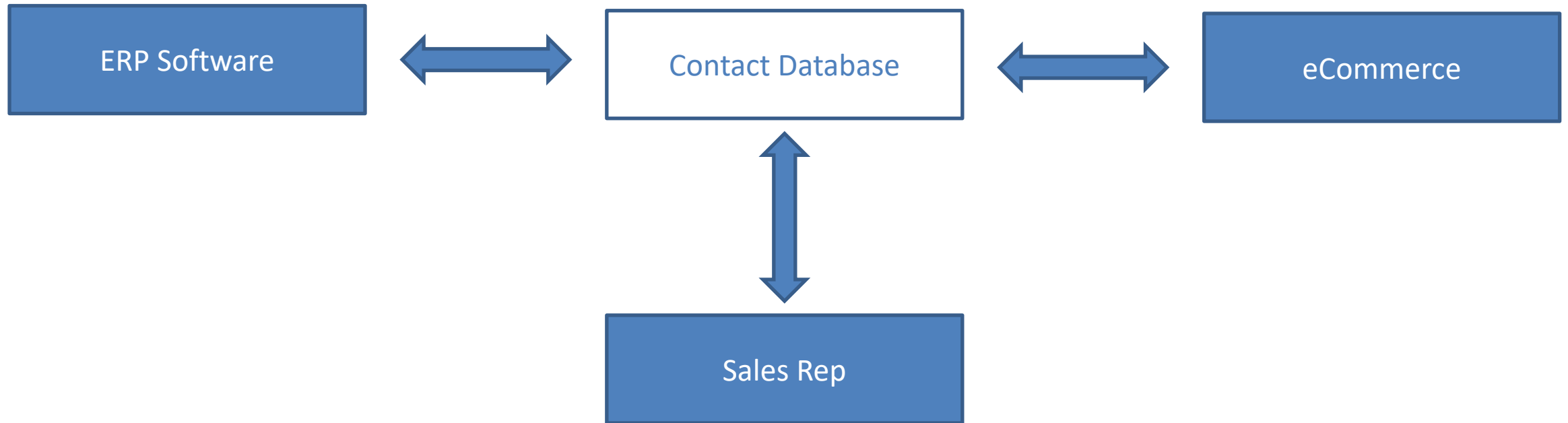# PocketProfiles – Contacts with Accelerated Adoption

Accelerated Adoption Phases

Phase 1	→	Train Sales team with Date Entry Deadline	→	Manager Review
Phase 2	→	Message to Warn Reps Before Deadline	→	Manager Reporting on Skipped
On Going	→	Confirmation of Data Every 21 Days	→	Manager Reporting on Skipped

Contact Sync

Accurate Contacts are the Foundation of the Customer Experience

ERP Software ⬌ Contact Database ⬌ eCommerce

Contact Database ⬍ Sales Rep

All Contact Data Follows the Customer to the Next Rep

PocketProfiles – When Called on with Accelerated Adoption
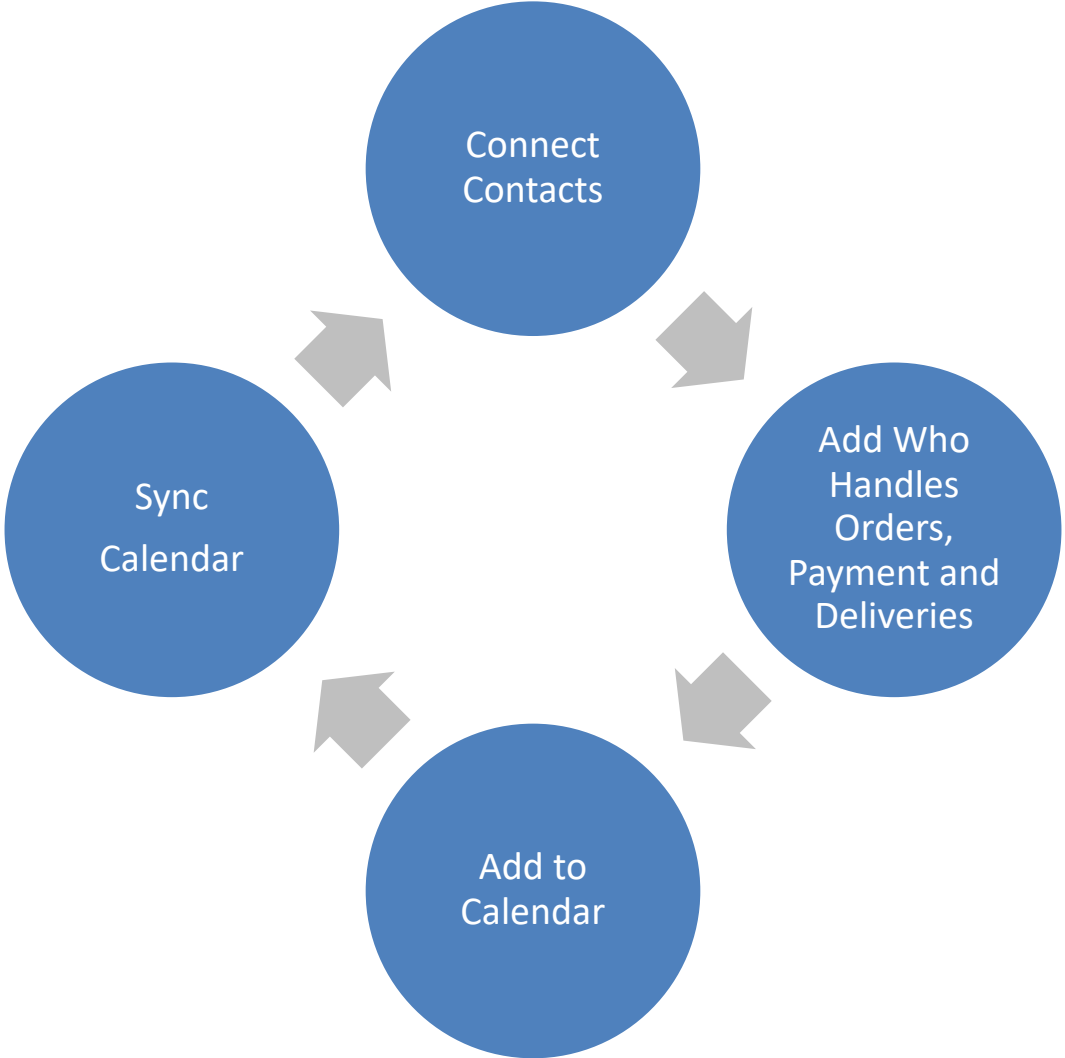
PocketProfiles Attributes
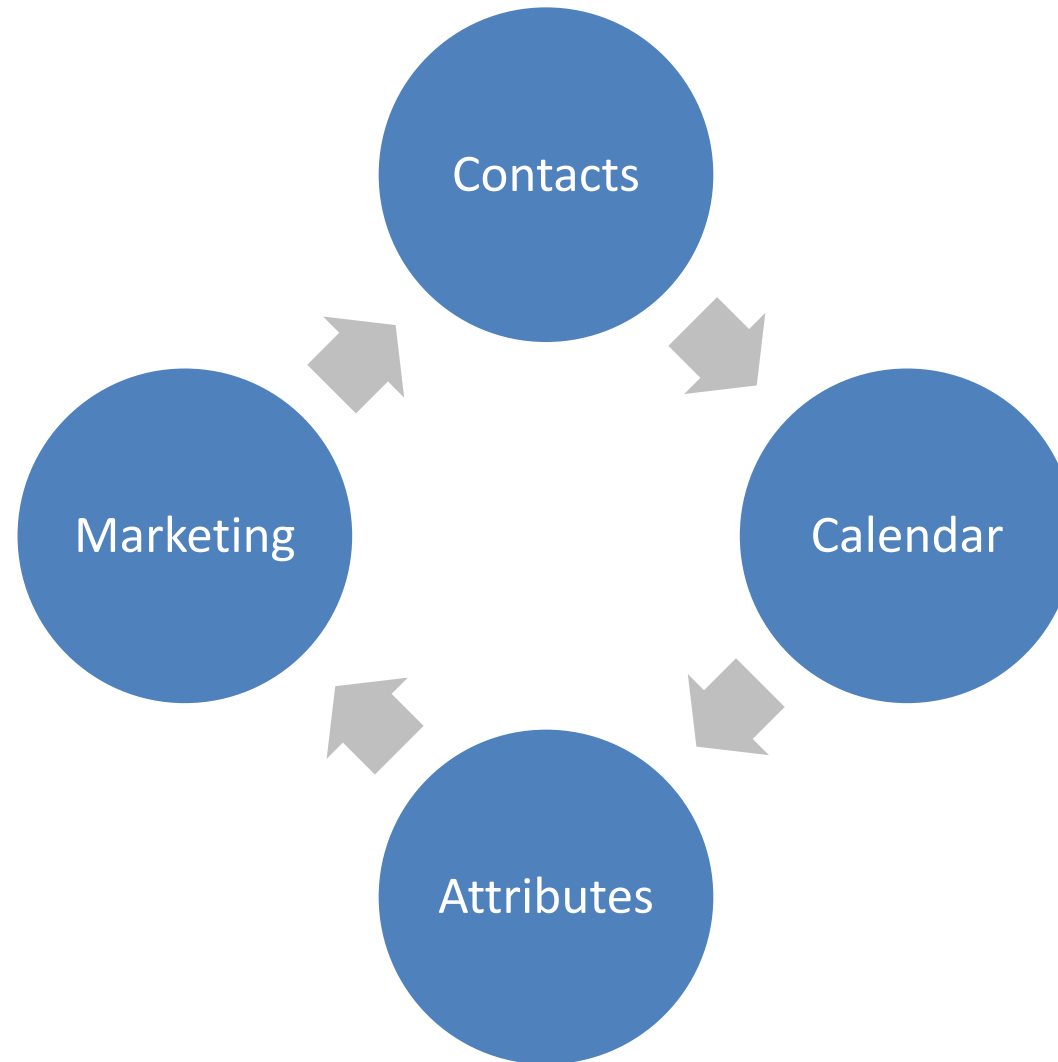
All Customer	On Premise	Off Premise
Delivery Day Preference	Wine By the Glass and Wine List	Displays
Delivery Time Windows	Spirits Drink Menu, Well, Back Bar	Cold Box
License Information	Beer Tap Handles, Menu	Shelf

6-8 Weeks...

....or the 90 Day Fog

Marketing with Profiles

Email Marketing Process
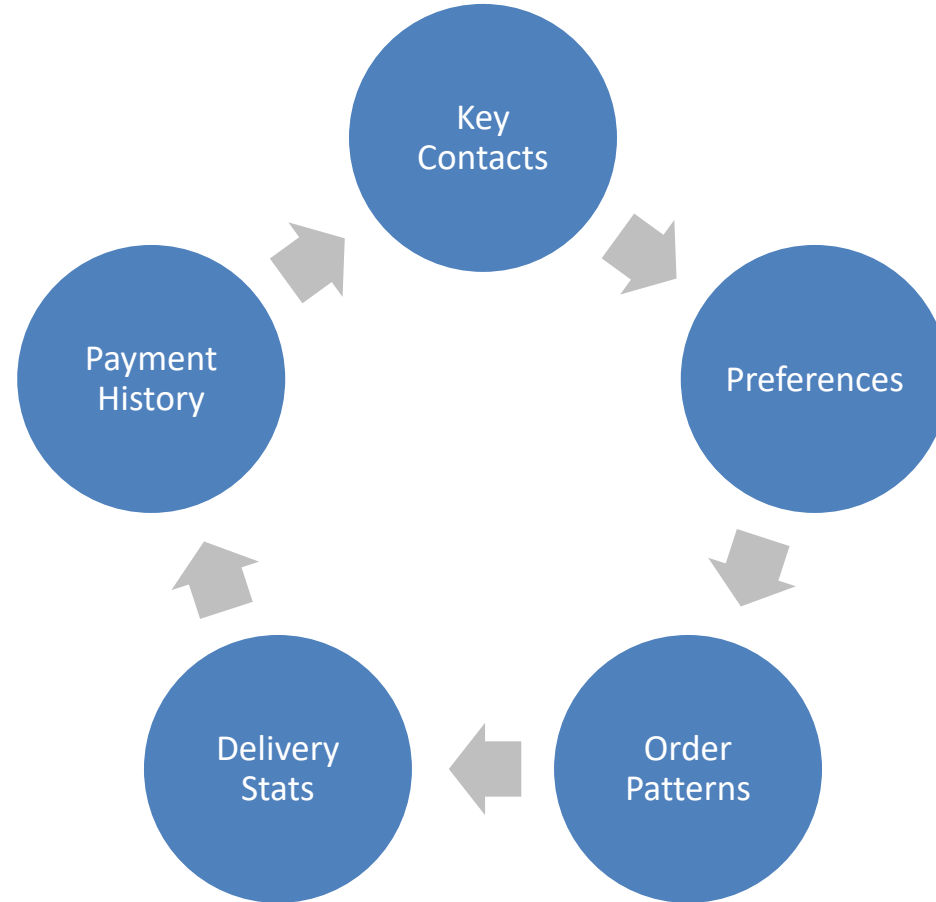
Marketing Team

Contact Database

Campaign Reporting

Customers

Marketing Ideas with Automated Workflows

Engagement Emails

Transactional Emails

Receipt Emails

Key Contacts

Preferences

Order Patterns

Delivery Stats

Payment History

Welcome Email

Brand Stories

Tutorials or Tips

Cart Abandonment

Time Sensitive Promotions

Sales Follow Up

Questions?

Do the customers opt in for messages?

Can the customer order from the email?

What tracking is available?

Takeaway

The digital transformation of the industry is here,
and Inventiv can help you with the changes required to compete

Questions?

Thank you....
See you next year