

Sage 300 Wholesale Distribution

CLIENT SUCCESS STORY



Client

Planet Foods
planetfoods.ca

Industry

Wholesale
Distribution
Food & Beverage

Headquarters

Calgary, Alberta

System

Sage 300
Sage CRM
Sage Enterprise
Intelligence

Planet Foods Grows Organically with Sage 300, Sage CRM and The Answer Company

Fifteen years ago, three veterans of the grocery industry teamed up to form Planet Foods, a successful distribution and trade marketing enterprise specializing in promoting natural and organic brands. The company has grown into one of the largest companies of its kind in Canada, representing dozens of the most recognized labels in the industry. Planet Foods relies on Sage 300 and The Answer Company to help manage its entire financial and supply chain operations, ensuring healthy, long-lived success.

Seeking Power and Flexibility

When Guy Bonnier was hired as Planet Foods' Director of Finance, the company was running an entry-level accounting package and a customized sales and marketing program.



planetfoods
True brand development.

"My first project was updating our enterprise software," he says. "We needed a much more robust, integrated platform to support both our front and back office."

Sage 300 Outshines the Competition

The company reviewed several Enterprise Resource Management (ERP) solutions, including Sage 300, Microsoft Dynamics GP, Microsoft Dynamics NAV, and SAP Business One. "We selected Sage 300," says Bonnier. "It has the flexibility we need along with powerful financial, reporting, and when combined with Sage CRM, the sales and marketing tools we were looking for. The Answer Company impressed us, because we knew we'd need to customize the system, and they have a highly-capable development team."

Addressing Industry Challenges

Common in the grocery industry, Planet Foods has a complex product pricing structure that varies based on numerous factors, including customer, product group, quantity and purchase dates. "We need our ERP software to support that structure, and The Answer Company was able to customize Sage 300 to deliver the pricing flexibility required," says Bonnier.

The company also needs to track trade spend, which is the money Planet Foods spends to promote a product at the retail level. Bonnier says that Sage 300 was the only solution it reviewed that offered the flexibility to track and report upon this vital element of its operations.



About The Answer Company

The Answer Company is a leading supplier of business management software and technology consulting services. Since 1995, we have been helping businesses answer the difficult questions with regards to investments in technology and information systems. Our goal is to make businesses more successful at what they do and gain confidence to make profitable moves in their respective industries. Our software solutions support accounting, operations, customer relationship management, human resources, time tracking, merchant services, and the specialized needs of the manufacturing, construction, distribution, healthcare, nonprofit, and real estate industries.

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Complete View of Customer Activity

Planet Foods' sales team runs Sage CRM on their mobile devices, enabling them to take orders while on site with customers. The seamless interface between Sage CRM and Sage 300 then ensures the orders are automatically transferred into the accounting software for fulfillment, resulting in a faster order to cash process.

The combination of Sage 300 and Sage CRM provides Planet Foods with a complete view of its customer activity across the company, delivers deep insight into customer and product sales activities, and increases the productivity of its teams.

In addition to helping Planet Foods' sales team work faster and smarter, Sage CRM captures the metrics Planet Foods uses to detail its marketing efforts to its brand customers. "Our brands want to know who we're talking to about their products," says Bonnier. "Account reps track this information in the software and we've developed reports that document the activity."

Insight Into Business Operations

The company is leveraging the business intelligence capabilities in Sage 300 to report on the health of the company, predict sales trends, pinpoint product profitability, compare sales territories and identify both top selling items and under-performers.

"This is a powerful product," notes Bonnier. "We plan to further expand our use of its reporting capabilities. It really allows us to analyze every aspect of our operations. We can use it to keep

everyone informed and accountable by scheduling the reports to automatically generate, and delivering them directly to our staffs' inboxes."

Fresh Approach to Service

Bonnier has high praise for the consulting and development team at The Answer Company. "They have helped us work through problems by coming up with effective, creative solutions," he says, "and there is a lot of depth across the organization, from accounting knowledge all the way through engineering and IT. I can't say enough about The Answer Company's professionalism, experience and their expertise with the product."

He concludes, "We've partnered with The Answer Company for more than seven years, and I can't see that changing. We work very well together."



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