

CUSTOMER SUCCESS STORY:

Vesco Oil

Vesco Oil Optimizes Sales and Improves Cash Flow with FieldOffice

Based in Southfield, Michigan, Vesco Oil is one of the largest distributors of automotive and industrial lubricants and supporting services in the country. They distribute branded lubricants such as Valvoline™, ExxonMobil™, Castrol™, Motorcraft™ and other products and also provide environmental services such as bulk and hazardous waste management.

Founded in 1947, this family-run business employs more than 200 workers and operates more than a quarter million square feet of warehousing and distribution facilities throughout Michigan, Ohio and Pennsylvania. Vesco Oil's supply chain also includes more than 70 service and delivery trucks, tankers and vans to service customers.

FieldOffice: A Strategic Sales Strategy

Vesco Oil's C-level management tasked Lance Melnik, the company's IT manager, to improve the sales process by enabling salespeople to look up and enter orders from the field. Vesco Oil operates four divisions, Automotive, Industrial, Service and Car Chemicals, with each of those divisions using its own distinct business processes.

Their goal was to implement a mobile system which could streamline sales processes, optimize order processing and invoicing, improve worker productivity, enhance customer service and ultimately drive more sales and improve cash flow. Moreover, the mobile solution also had to be flexible enough to address the distinct nuances of each division.

As an Infor SX.e user, Melnik saw a demo of Expertek's FieldOffice at an Infor TUG user event and determined it was the "right fit" to achieve the company's mobility goals. With Expertek as their partner, Vesco Oil soon rolled out FieldOffice to 48 users across all four divisions.

Faster Order Processing and Streamlined Invoicing Improves Cash Flow

Prior to FieldOffice, Vesco Oil relied mainly on manual processes in its sales operations where workers placed orders primarily by phone, fax or email to two order entry departments staffed by ten employees. Depending on the division, each order would wind its way through various processes, signoffs and manual paperwork until an invoice would be mailed to the customer sometimes up to eleven days later.



VESCO OIL CORPORATION

Vesco Oil

www.vesco-oil.com

Industry: Oils and Lubricant Distributor

Core Products: Automotive and industrial lubricants

Headquarters: Southfield, Michigan

Number of locations: 9 locations

Number of employees: 220+

Founded: 1947

Technology solutions used:

- Infor SX.e since 2001 (149 users)
- FieldOffice since 2015 (48 users)

Since implementation of FieldOffice, more than 90% of orders now are transmitted instantaneously via workers' iPads. This has led to a dramatic reduction in order processing time with invoices now mailed to customers in 24 hours. According to Melnik, FieldOffice not only enables the processing of a greater volume of orders in less time but it also promotes significant productivity and cost efficiencies since less resources are needed for order entry and employees have been reallocated to other areas of the business. Melnik also reports an improvement in cash flow after the invoice processing substantially improved.

Optimizing the Customer Experience

Vesco Oil's success and continuous growth is built on delivering quality products, services and consistent, high level customer service. Technology also is playing a key role in how it engages customers and optimizes the customer experience. FieldOffice helps salespeople develop a deeper understanding of customer needs and creates a memorable experience where their needs are addressed with even higher levels of customer service.

FieldOffice gives Vesco Oil's salespeople complete visibility into the company's SX.e ERP data from their iPads. Salespeople can give customers immediate information on inventory availability, pricing and other product and customer information. Quotes and orders can be drafted and submitted in a matter of minutes on the spot rather than waiting until they are back at their desk.

Melnik notes how FieldOffice also can help salespeople drive more sales by viewing the shopping list feature which enables them to quickly access a customer's order history as well as other useful trends and details. "We can then use the company's Business Intelligence system which can provide a prediction of whether we are losing sales or if it's just time for a reorder again. This is valuable information for salespeople to leverage when servicing customers," says Melnik.

Delivering a Mobile POS and VMI Functionality for Route Sales

Vesco Oil's Car Chemical division business includes a line of appearance products such as waxes, polishes, cleaners and paints which are sold to dealerships, car washes, detailers and body shops. Sales processes at this division utilize both vendor managed inventory (VMI) and point of sale (POS) models where the sales person's vehicle is operated as a "mini-warehouse." For this division, it's important to keep stocking levels fluid and responsive to demand. This new version of FieldOffice, with automated VMI functionality and key modifications specific to the Car Appearance's business needs, was implemented in April 2017.

With FieldOffice, salespeople there count stock and then check the correct quantity levels in the system based on pre-established criteria. Then, they can restock inventory, generate purchase orders, and print out a receipt for the customer on the spot. This facilitates better inventory and cost control while meeting the needs of customers by assuring they have the products they need when they need them.

Improved ... Productivity. Visibility. Customer Service.

FieldOffice gives each sales rep complete visibility into the SX.e data directly from their iPads, so Vesco Oil's salespeople can give customers immediate and accurate information on inventory availability, pricing and other product and customer related information.

A Strong and Collaborative Partnership

Melnik values their collaborative relationship with Expertek especially in the development of future versions of FieldOffice with enhancements that address the company's evolving business requirements. "Expertek takes customer feedback and input into great consideration when developing future versions. They listen to us and this latest version of FieldOffice directly addressed the needs of our route sales business."

As further testament to FieldOffice's performance, Vesco Oil's upper management team took notice on the efficiency transformation of the sales process, Melnik says. At a recent semi-annual meeting for one of its divisions, executives encouraged their other divisions to fully embrace this mobile sales strategy powered by FieldOffice.

Melnik concludes, "FieldOffice solved a huge business processing issue that was a main focus in my job. Salespeople love it since it gives them real-time visibility of inventory and shortens order turnaround times. They also value the ability to tell their customers immediately if the product is in stock and how long it will take to get their product. It has been a home run for us."

About Vesco Oil

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About Expertek Systems, Inc.

Expertek designs, develops and delivers innovative mobility solutions that allow our valued customers to take their business software mobile. We leverage the latest in technology and industry partnerships to deliver the best mobility solutions, backed by our proven distribution expertise. We enable Infor ERP users to take their ERP software mobile to optimize operations, improve business performance and enhance customer service.

www.expertek.com



What is FieldOffice?

Designed by Expertek specifically for Infor SX.e users, FieldOffice is a mobile app that integrates core SX.e functionality on an iPad®.

What does FieldOffice enable?

It enables your sales team to use Infor SX.e as a mobile application, allowing users to function more efficiently, reduce processing times and provide better, faster service to your customers such as:

- Capture customer quotes and submit orders remotely
- Check inventory availability, pricing, credit status
- Edit and check customer notes and contacts
- Access and email product material on demand
- Look up past order history
- Tender credit cards
- Scan product bar codes



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