Case Study

Tour de Force
Enterprise Software Solutions
Be Efficient. Be Effective.

Shippers Supply, Inc.

- **Customer Since 2011**
- **32 Users**
- **Infor FACTS ERP**

SSI SHIPPERS SUPPLY, INC.

Location
Hopkins, MN

Industry
Shipping/Packaging Solutions Distributor

Website
www.shippers-supply.com

Shippers Supply, Inc. is an independently owned and operated wholesale distributor of shipping, packaging, industrial and productivity/equipment solutions. Founded in 1928 in Hopkins, Minnesota, Shippers Supply, Inc. serves the upper Midwest.

In early 2011, Shippers Supply began to search for a solution to replace their current GoldMine CRM system. While GoldMine provided basic contact management capabilities, Shippers Supply needed a more complete solution that would provide CRM, SFA (sales force automation), BI (business intelligence), and would sync data from their Infor10 Distribution Express (FACTS) ERP system. They also wanted a system that would allow them to access information from mobile devices and would give them the ability to analyze and manage their sales pipeline.

Narrowing the field from 77 to 1

The team at Shippers Supply initially reviewed a list of 77 CRM offerings, including Salesforce.com, ACT!, and NetSuite. They narrowed that list down to 3, and eventually chose Tour de Force. The key differentiators that stood out about Tour de Force were the integration with Microsoft Outlook, the integration with the Infor FACTS ERP system, and the configurability of the system. Tour de Force offers a virtually unlimited number of user defined fields, which allows every company to configure the system to meet their specific needs and processes. Tour de Force was also able to provide the full range of functionality that Shippers Supply was looking for: a complete CRM and SFA solution that would allow them to manage their sales pipeline and would provide their sales team with mobile access.

Shippers Supply went live on Tour de Force in July 2011 with most departments in the company using the system, including Customer Service, Purchasing, Sales, Management, Accounting, and the Service Department. Sarah Zaporski, Database Administrator, recalls that her fellow employees "were really excited when we brought Tour de Force on. We've had some additional training since the implementation, and some of our sales reps that may have been behind the curve as far as technology goes have really started getting into it. They've all found it to be very user friendly."

Linking islands of data

As the staff at Shippers Supply began to use Tour de Force, they started to realize that they had a data disconnect. While the Customer Service team used Tour de Force to manage their customer information, they also used Relationship Management (RM) from Pivotal Systems, an Infor FACTS partner solution that is used to manage customer relationships. The Customer Service Department worked primarily out of FACTS, especially when they were taking an order or talking to a customer on the phone about a product, and naturally used the RM system while they were in FACTS. The Sales Department, on the other hand, did not use the Infor FACTS system at all, and used only Tour de Force to manage their customer information. The result was that Shippers Supply had 2 distinct sets of contact files for their customer base but did not have the ability to make sure that both data sets contained the same information.

A standard feature of the ERP integration that Tour de Force offers is the ability to pull contact information from the ERP system into the Tour de Force database, along with account data, sales history, open orders, etc. While this standard synching of data was already taking place at Shippers Supply, they began to wonder if there was a way for Tour de Force to sync contact data back into the Infor FACTS ERP system. This would link their islands of data and ensure that there weren't two completely different sets of data files being used in the organization.

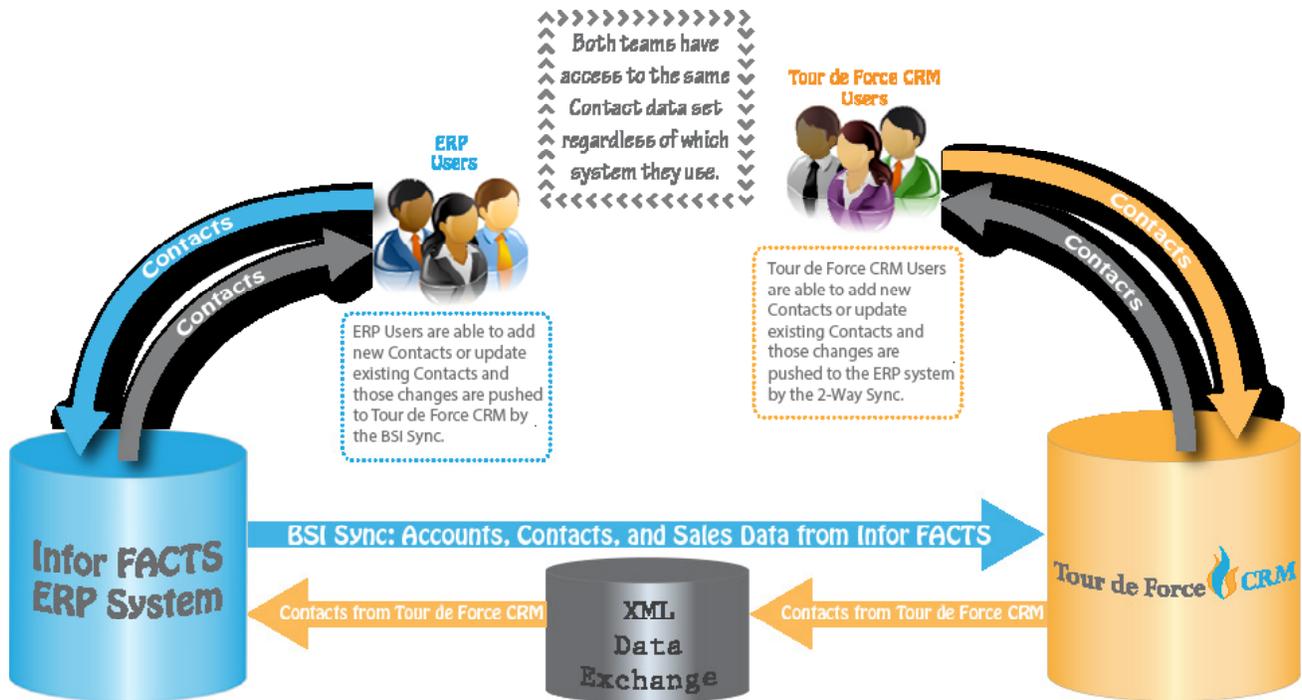## Developing a 2-way sync with Infor FACTS

In late 2011, Shippers Supply contacted their Tour de Force Business Consultant to review the possibility of creating a 2-way sync that would push contact information from Tour de Force CRM into Infor FACTS. The development team at Tour de Force had recently completed a major release, Tour de Force v5, and was poised to take on the challenge of developing a 2-way sync for the Infor FACTS ERP system as well as several other popular ERP systems.

Early on in the development of the 2-way sync to Infor FACTS, the team at Tour de Force began to communicate with Shippers Supply's Infor FACTS reseller, Pivotal Systems. The development team at Tour de Force is able to create the BSI Connector software, which pulls data from an ERP system, without involving the ERP provider. After speaking with Pivotal Systems, however, they found that pushing data directly into Infor FACTS without using their API toolkit would negatively affect Shippers Supply's warranty on their FACTS system. As a result, Tour de Force was required to work closely with Pivotal Systems throughout the development process. Zaporski recalls that "the development of the 2-way sync went really well. We were included on all of the communication that took place between Pivotal Systems and Tour de Force, and they did a great job of keeping us informed on the status of the project. Both companies answered our questions clearly so that we really understood what was going on, and gave us the information we need to make the best decisions in the areas where they needed our input. The whole process worked really well, and we're very happy with how it turned out."

> "The Tour de Force CRM system gives us the ability to link the past with the future. We are very excited to tie our sales pipeline into our strategic business planning process. It will help us to make more calculated business decisions as we continue with our aggressive growth initiatives."
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> **Jeff Schuppe | Director of Sales & Marketing**

Tour de Force 2-Way Sync with Infor FACTS ERP System

The 2-way sync with Infor FACTS was completed and implemented at Shippers Supply in early Spring 2012. With close to 17,000 contacts in their database, the 2-way sync process allows Shippers Supply to efficiently utilize one uniform set of data across their organization. When the Customer Service Team enters a new customer into FACTS, the Sales Team is automatically able to access that customer data in Tour de Force. When the Sales Team enters a new prospect or new contacts at a customer account into Tour de Force, the Customer Service Team automatically sees that data in FACTS. This ability to easily and effectively share information between the Sales and Customer Service departments allows the employees at Shippers Supply to make informed decisions and deliver the highest level of customer service possible.

Growing with Tour de Force

Tour de Force is a full featured software solution which offers many advanced functions. As such, many customers choose to start with the basic functionality and grow into the advanced features over time. According to Jeff Schuppe, Director of Sales and Marketing at Shippers Supply, "The Tour de Force system gives us the ability to link the past with the future. We are very excited to tie our sales pipeline into our strategic business planning process. It will help us to make more calculated business decisions as we continue with our aggressive growth initiatives." In addition to beginning to use the business planning features in Tour de Force, Shippers Supply also plans to start using more of the advanced reporting functions, the Alerts & Notifications module, and plans to implement tablets for their outside sales team to use Tour de Force Web.