

# Newsflash

FROM LINDA SWERLING

**September 8, 1997** - Fall brings cool air and a renewal of energy. Take advantage of this time to make sure your operations will be at their peak performance during the fourth quarter. Following is the third in a series of client success stories.

## **SALES, ORDERING, AND DELIVERY: A PROCESS, SYSTEMS, AND OPERATIONS EVALUATION BEFORE A MOVE**

### **PROBLEM:**

In preparation for a move to new facilities, the president and controller of a \$20 million wholesale perishable food broker thought it would make sense to evaluate their sales and order processing departments in order to determine how automation could help to solve what were obvious problems:

- ◆ **Sales orders** were not distributed efficiently
- ◆ **Inventory** mistakes were frequent
- ◆ **Communication** among the sales people appeared to be ineffective.

### **SOLUTION:**

After meeting with the president and controller to get an overview, we spent time on site observing the operations at their busiest times of day and meeting individually with key employees.

From observations and interviews, we determined three key causes:

- ◆ The **manual sales tracking system** was causing a big bottleneck
- ◆ **Sales was not passing orders** to the floor in a timely manner

Overall **inventory tracking was ineffective**, resulting in out-of-stock items, shipment of incorrect product, and late deliveries.

### **RESULT:**

As a result of the evaluation, we worked with the company's database consultant to develop the plan, budget, and timetable for automating these departments, which ensured that the original problems would not be repeated in the new location.

*As always, Level II Solutions is a resource for problem solving, strategic planning, business start-ups, operations, finance and accounting, cash flow management, information technology, and human resources. Until the next News Flash ... Enjoy the fall!*

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