More sales with less effort, thanks to Zoey's suite of capabilities

The Company

ManaMed

Founded in 2015, 70 Employees

http://www.manamed.com

What They Like About Zoey

1. They are able to hire more inside salespeople, leveraging Zoey's capabilities, to grow sales more efficiently.

2. Salespeople can also train their customers on how to purchase through Zoey, encouraging more customers to be able to purchase on their own.

3. Zoey's self-service ordering and catalog display capabilities exposes buyers to other products besides what they've already purchased.

4. Sales are up 50 percent, but the order management labor is down significantly, allowing the customer support team to spend more time helping their customers

5. Manamed can process orders in bulk through an internal tool they've built to communicate with Zoey's open APIs.

The Challenge

Manual orders were coming in via email and had to be entered into multiple systems. Eventually they got to entering data just once, and having it sync to other systems, but there was still the persistent problem of manual data entry, paired with often incorrect prices being placed on invoices.

The Success

Customers can now place orders on their own, and their orders reflect their pricing accurately. Data entry mistakes have been largely eliminated, and more orders can be processed with less manual labor required to get them processed and fulfilled.

What Makes Them Special

Manamed is a quickly growing business, with new product lines regularly coming online. The shift to an order portal and centralizing orders with Zoey has unlocked the ability to grow faster than was ever possible under their previous processes by organizing a process that was very manual and is now highly automated. It also ensures they can expose existing customers to new product lines, with the goal of expanding existing customer relationships to new products.

By the Numbers

Dealing with Constant Data Entry Issues

Manamed is a quickly growing business based out of Las Vegas, Nevada. When Erik Lorenz started with the company to take on a technology role (and today is their Chief Information Officer), orders were coming in via email and being entered manually.

At the beginning, Lorenz said, "We were just entering orders off of emails. Maybe one out of every 30 would have the right information. One guy would enter those into QuickBooks and then also have to enter them into UPS Worldship and it would print out the labels. We had nothing."

The first step for Manamed was having a synchronization between QuickBooks and the shipping solution. "We entered orders into Quickbooks, and then could sync the data into the shipping system. That was a big step as it cut out half of the data entry."

Still, receiving orders via email was creating a lot of manual labor, and data entry mistakes were happening regularly, frustrating both internal teams and Manamed's customers. But on top of that, pricing was regularly incorrect on invoices.

"It was not just manual mistakes," Lorenz said. "The worst one of all was that peoples' pricing was always wrong. THey would talk to someone, and that information wasn't saved anywhere. It was not perfectly updated, or they didn't look, or they would say it's something different. That was the biggest problem. We pretty much had to go back and edit more than half the invoices. That was a huge problem - probably the biggest problem. We can throw manpower at the other stuff, but we can't fix that without a new solution."

Zoey Provides Customer-Specific Pricing

Zoey offered two immediate key benefits for Manamed: The ability to ensure orders are placed in a system designed to receive those orders, and the ability to set customer-specific pricing. Both of these improvements transformed Manamed's ability to run its business.

"When we had them first log into Zoey, none of these prices would be right," Lorenz said, noting customers would need to be assigned their correct pricing. "Then everyone got it. And then brand new customers, it's part of the setup, so it's always good. It was something that needed to be taken care of; it forced everyone to deal with it so it was nice."

Salespeople are now able to shift their attention from managing every order to getting new customers up and running, because the Online Portal takes all of the manual order entry out of the equation.He said that their salespeople "set them up. They pretty much never do orders on behalf of the customer. They set up a new customer once we get the agreement. They get them a login and show how to set up an order. They just get which users are going to use it for the different roles and set up their pricing. That's pretty much it."

With this switch, salespeople can work on acquiring new customers, instead of having to focus solely on servicing the existing customer base. This change means it's minimal overhead to grow the business compared to before.

"Keep in mind, whenever there's a new customer the only thing they know is Zoey," Lorenz said. "There's no additional manual labor. The average customer is just a marginal increase in what we have to do. Plus now we have more sales reps, handling more of the actual sales conversation," so the combination of Zoey and more salespeople means they can grow their sales more quickly.

In addition, Manamed has increasingly been equipping their independent distributors with access, meaning even they can help get customers set up to place orders, centralizing everything in one location.

And for the customers, Zoey's ability to assign roles to users under accounts has further simplified the setup process. He said, "When you sign up a new customer, the guy placing the orders wants to get the order information, but doesn't want the bill. Accounts Payable wants the bill, but not the order. It's another thing that's super easy to take care of in the setup process, which cuts down on customer service requests so that's really helpful. The more things we can get done upfront the better."

Catalog Visibility Encourages Sales Conversations

Zoey's self-service order portal capabilities adds an additional benefit for Manamed: As they grow their product line, they can surface these products to their existing customers, and have the opportunity to expand their relationships with those customers.

"It is helpful that they see our full catalog," Lorenz said. "One of my pet peeves was when you look at low hanging fruit, the vast majority of our customers buy 2-3 products. We have 50+ products now. Just them being able to see it is good, and then it opens a sales conversation about price. We've started using that of what people are buying and adding the cross sells and upsells, and get a little more targeted."

Zoey's APIs Do the Rest

Manamed has use cases where they need to do bulk order processing, which can come from sources outside the order portal, and bulk pricing updates. Both of those could be very difficult without a data importing option, but fortunately Zoey's open APIs paired with Lorenz' tech savvy means this is also manageable.

Lorenz has an in-house built tool that can take the pricing data from another system they use and quickly apply it to products and accounts. And for bulk orders that come through via spreadsheet, he can import them into Zoey for processing just like the rest of their orders.

In Their Words

"Being able to convert Drafts or Quotes into Orders is huge because we sell so many different products, buyers will likely change their mind on things. Using the Drafts feature, we can change as many times as we want without having to create a new order, or cancel an old order and reissue a new order."

Ben Bartell, Owner, West Coast Distributors

In the case of orders, he said that "a customer sends in an Excel file, and we take a few minutes to update it into a CSV. We can send as a batch or upload it one by one to get orders into the system.

In addition, Lorenz said "I made my own price tool; it just spits out the CSV price list to upload. Those are the two main things. Bulk orders and pricing I made separately. The rest we keep within Zoey."

Manamed has Microsoft Dynamics as a CRM that can capture signatures on new contracts, and they're adopting ERP capabilities too. Through the APIs, Zoey and the CRM are now linked and can automatically create accounts in Zoey. They're also nearly complete with tying in their ERP, further connecting the various parts of their business together.

In the end, Zoey has streamlined a variety of workflows for the business, sped up the ordering process and reduced frustration points. In fact, according to Lorenz, many of their issues now fall in other parts of the technology stack. "Ninety-nine percent of our pain points are having to do with other solutions, which isn't Zoey. All these improvements you're making, we see them and you've continued to make our lives easier, eliminating tasks in our workday."

About Zoey

Zoey is a powerful eCommerce solution for B2B and wholesale businesses. We offer three major solutions to run a business: A mobile app for taking orders on the go, a self-service web portal for eCommerce, and a web-based admin for product, customer and order management. Our features include net terms and credit limits, sales quote generation, customer groups, access restrictions, and quick order capabilities.

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www.zoey.com
info@zoey.com
855-446-1200