



WEST COAST DISTRIBUTORS CASE STUDY

Zoey mobile app pairs with trucks, acting as mini-warehouses, to bring orders directly to customers

The Company



West Coast Distributors

Founded in 2015, 4 Employees

www.westcoastdistributors.com

What They Like About Zoey

1. White glove service getting setup with Zoey is different than most businesses. The Zoey team saw through what they said could be done.
2. Zoey can manage complex pricing scenarios, such as tier pricing across a group of products, as opposed to just individual SKUs.
3. The web platform allows customers to reorder with ease, especially those comfortable with the products West Coast Distributors sells.
4. A pending order can be updated and edited on the go with the Zoey App, since many customers will purchase additional products on the go.
5. Invoicing through Zoey is simple for their customers to login and review, and makes managing what's due simple for both sides.

The Challenge

A previous solution stopped getting updated, and got increasingly difficult to use as the business grew. So West Coast Distributors turned to Zoey to provide a more modern solution that the business can grow into over time.

The Success

- Many orders are done on the ground with mobile trucks (which act as mini-warehouses for the business)
- Their buyers are increasingly able to pre-order, making the trucks more productive on their routes, helping the business continue its growth trajectory
- Their team can identify upselling opportunities based on what the customer has and hasn't bought
- Draft Orders can be adjusted as often as needed before final delivery, and the order can be converted at that time

What Makes Them Special

They sell glass products, which tend to be unique and have a level of variance. Customers therefore often want to select the products for their inventory. Their mobile trucks make this possible by bringing the warehouse to the businesses' doorsteps.



Contact us for a personalized demo!
zoey.com • info@zoey.com • 855-446-1200

In Their Words

“The Zoey team can’t really over promise because they have to do the work. It was different from other companies where you have to do the setup. They overpromise and you are stuck with something that doesn’t work, whereas with you, what was delivered was exactly what was promised.”

Ben Bartell, Owner, West Coast Distributors



Migrating to Something More Robust

West Coast Distributors has been in business for awhile, and had established themselves on a different platform, Insitu. However, they were noticing that what they had been reliant on was not being kept up as much as it had previously.

“With our previous vendor, in the beginning they were doing a lot of things, and fixing bugs,” said Ben Bartell, owner of the business. “As time went on, that work stopped happening and they even stopped responding to emails. It’s not a good sign if we’re not getting responses. We can’t have our website go down.”

They further struggled with bugs and issues that impeded their business’ ability to function normally. “The bugs that they had were not getting resolved,” he said. “It created tons of frustration with invoicing and keeping track of inventory. It was rough.”

He and his wife decided it was time to look at other options. His wife took on the responsibility of researching options and seeing what was out there. She kept him informed about the process and noted that Zoey seemed to have a different approach than other vendors.

The key was to get organized beforehand, something Zoey facilitated in the conversation. Bartell said, “Before you begin the setup process, you have to think through how you want to group different products and make it easier for your customers to find things. Once you’ve thought through that and how you want the website to look and function. It was super easy. Zoey has lots of features and lots of settings.”

White-Glove Service from Sales to Onboarding

Lots of features and settings could theoretically make getting started a painful process, but the other thing Zoey does differently is offer a hands-on onboarding experience that pairs a Zoey implementation specialist with a new business.

This hands-on process began in sales and continued into the setup process. “In terms of the sales process it was great, it was a white-glove service,” he said. “The Zoey team can’t really over promise because they have to do the work. It was different from other companies where you have to do the setup. They overpromise and you are stuck with something that doesn’t work, whereas with you, what was delivered was exactly what was promised.”

For Bartell, he said this kept the conversation honest. “They told us what was currently capable and gave us realistic expectations. There were just a couple of things with the app needed and the app is getting updated constantly.”

In Their Words

“The other thing is you don’t get abandoned once everything is setup. Just because you’re done, it’s not like you can’t reach out to support and get some help. Their response time is phenomenal. It’s been a very good experience.”

Ben Bartell, Owner, West Coast Distributors

This difference in experience carries through to support once things are up and running, Bartell said. “The other thing is you don’t get abandoned once everything is setup. Just because you’re done, it’s not like you can’t reach out to support and get some help. Their response time is phenomenal. It’s been a very good experience.”

Truly Mobile Salesforce

West Coast Distributors leverages a small fleet of vehicles that travel to their various customers, deliver pre-ordered items and sell other items. This format is leveraged in certain industries, and can be very beneficial in terms of driving add-on sales at the time of the visit.

“We have basically mobile warehouses,” Bartell said. “Our people pull up. Sometimes the customer orders online and we deliver, but usually they want to add stuff to the sale because we have product on hand. It’s a huge advantage because we can go in and add on other sales. It’s not just delivery but we can increase upselling at the time of the sale.”

Zoey’s mobile app makes building orders, or modifying orders, easy thanks to its Drafts and Quotes functionality. With Drafts, an order can be initiated but not completed, allowing for modifications before submission. A Quote, on the other hand, can be generated for approval by the customer. In both cases, modifications can be taken into account before an Order is completed.

“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,” he said. “‘Oh, I don’t need 10 of these, I need 5 of those and 10 of those.’ So we need the ability to edit orders. 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.”

The nature of the products they sell means their customers will adjust in real time. “Most of our customers are in person because we do glass sales. They want to pick that glass out by hand because it all looks a bit different. Anybody who is like an artist, this is a great solution for them too. Selling something on site as well as online would be a great solution.”

Online Portal for Preorders, Reorders and Invoice Management

The mobile app helps with sales in the field, but West Coast Distributors has also been able to successfully leverage Zoey’s Order Portal capabilities to empower their customers in a variety of ways.

The ability to track invoices has proven to be a strong benefit of choosing Zoey. Zoey’s billing features includes the ability to generate invoices, which customers can see when they log in.

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

Bartell said, “We’re using the Zoey invoicing because the customer can also go on and track their own invoices. That’s great - customers love that.”

They have also tied their Zoey account to their QuickBooks Online account, allowing invoices to be auto-generated on the QuickBooks side and making accounting easier.

Along with invoices is the simple ability to initiate reorders, another tool that’s helped them get sales organized before they hit the road.

“The web portal allows the buyer to very easily and quickly reorder product,” he said. “They can go into an invoice, click reorder, change the quantities and be done. It helps us maintain our presence even with buyer turnover just because they have that functionality.”

Buyers in the Order Portal also have the ability to create a draft, which their salespeople can then access on the Zoey App and modify, or complete, once on site. This allows them to work more collaboratively with their customers.

“If they preorder before the truck leaves the warehouse, we can have all their preorders packed,” Bartell said. “Then they know what to offer the customer that they didn’t order, and can add those on pretty quickly. We’ve seen some efficiency there,” which has led to average order volume growth for the business.

Reordering also helps West Coast Distributors with customers by exposing them to new products, thanks to the ability to merchandise the website that their customers visit when checking their invoices or creating new orders.

“The reorder function is great getting them to actually login and see it,” Bartell said. “We tell them it’s just as easy as reordering something on Amazon, and they say ‘Oh ok! I can do that!’ They reorder stuff from Amazon all the time!”

He added, “The configuration of the website is so great. We can add the related products in a product. It’s also so easy to change the featured products. I think it has increased exposure to some of the new items. We try to be good about updating the featured products on the homepage to get some new exposure to those products.”

Better Support for Customers, Better Support for Them

Because the team is constantly on the road, they can easily make sure that their customers can sign in and create those orders and drafts, which can be helpful for ensuring they have everything their customers need. And when there’s an issue, they can even sign in as their customer in the Zoey Admin to help resolve issues.

Bartell said, “We can set their password, whether temporary. Some of their email systems filter out what the system considers a marketing email, even if it’s a password or login email. They tell us what the password is, we type it in. That’s been really helpful. We can also log in as the customer, and we can see exactly what they see.”

Of course, if it wasn’t for that white-glove onboarding, combined with continued top-notch support, Bartell and West Coast Distributors would not be able to offer the same for their customers.

“With our previous system, the response was terrible. By comparison, your support team is so good. We’ve had a great experience with Zoey.”

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.



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