

upland InGenius

Southern Glazer's Wine & Spirits Wins at Customer Advocacy and Inside Sales



INDUSTRY: Wine & Spirits Wholesaler **SIZE:** 20,000+ Employees **LOCATION:** Miami, FL

KEY IMPACTS:

- Better call capacity and user experience
- Accurate reporting of call metrics
- Improved customer satisfaction and Net Promoter Score
- Trusted call tracking for mission-critical issues

SUMMARY

Southern Glazer's Wine & Spirits needed computer telephony integration (CTI), but wanted a solution that could span multiple teams and complex infrastructure, which consisted of different CRM versions, phone systems and telephony switches. Southern Glazer's implemented InGenius for both their Inside Sales and Customer Advocacy teams. Using the solution, they've seen great improvements in their ability to handle more calls, create call reports and raise customer satisfaction. InGenius has provided a reliable means for Southern Glazer's to operate efficiently while complying with industry requirements.

THE CHALLENGE

The Inside Sales team at Southern Glazer's Wine & Spirits spends most of their day placing outbound calls. Their job is to consult each account to help select the best beer, wine or spirit based on their individual needs, which can be difficult over the phone. Southern Glazer's had recently implemented Salesforce and their Sales Consultants were happy with its capabilities, but quickly realized they needed a solution that would allow them to track their calls, including success and conversion rates.

The Customer Advocacy team at Southern Glazer's is responsible for helping to deliver the best experience for their customers, ensuring any problems and inquiries are resolved quickly and accurately at all times. Issues they address range from broken bottles and product education, to rescheduling a delivery and fulfilling urgent needs. Team members recognized that they would also benefit from a CTI solution. Advocates need to know everything about their customers when they call in, and they thought a product that could streamline that process would be invaluable.

Given the set-up at Southern Glazer's, their chosen integration needed to be compatible for both Salesforce Classic and Salesforce Lightning with Omni-Channel users. As an added complexity, Southern Glazer's also needed a solution that would work with both their Mitel and Cisco phone systems, spread over four telephony switches.

Since the Inside Sales and Customer Advocacy teams are primarily focused on an outstanding customer experience, it was also important that the solution be user-friendly, intuitive and easy to adopt, in order to maximize results.

BACKGROUND

Southern Glazer's Wine & Spirits is the world's pre-eminent distributor of beverage alcohol, and proud to be a multi-generational, family-owned company. Southern Glazer's is now North America's largest wine and spirits distributor and prides itself on the company's exceptional customer service.

THE INGENIUS SOLUTION

The Southern Glazer's Wine & Spirits Inside Sales and Customer Advocacy teams are spread out over multiple locations across the United States, on two different phone systems and two different Salesforce set-ups. InGenius was able to bridge these gaps handily with its CTI integration, InGenius Connector Enterprise, bringing phone to CRM connectivity to both teams with a single solution.

The InGenius user interface, which sits right in the Salesforce window, is simple and straightforward to use, reducing the learning curve required for a company focused on providing great hospitality.

INSIDE SALES TEAM

After an evaluation of multiple products, Southern Glazer's chose to implement InGenius CTI for its Inside Sales team based on the features InGenius Connector Enterprise offers, and on the solution's user-friendly interface. The Inside Sales team allocates a considerable amount of time to outbound calls and each Sales Consultant is responsible for upwards of a hundred accounts. The information the team collects on these calls is important for future communications and delivering an unparalleled customer experience.

Prior to InGenius, the knowledge gained from phone interactions was recorded in a decentralized manner. Now, using InGenius call logging templates, which can be preset by the team lead or by an individual, accurate, consistent notes are recorded in Salesforce at the end of each call. In addition, click-to-dial helps the team manage their call list so they can focus on selling product instead of chasing down phone numbers.

"InGenius simplifies a difficult job. It provides the user with the information they need, as well as the solution to interact with our customer that much faster."

Tiffany Thompson, Program Director, Southern Glazer's Wine & Spirits

CUSTOMER ADVOCACY TEAM

After the Inside Sales team's initial success using InGenius, the rollout was expanded to the Customer Advocacy team. Since Southern Glazer's is focused on providing an exceptional level of customer service, Customer Advocates need to have access to everything about a customer as soon as they call, so they can support their valued accounts accurately and quickly, while maintaining the highest service standards. Due to the nature of the job, it's important for the team to have rapid access to a customer's prior order history, and for individuals to easily add notes and update information.

Screen pop, which brings the relevant record to a rep's screen before a call is even answered, ensures that this rapid level of response is possible. The time saved from not having to hunt through Salesforce for a caller's account translates into time that can instead be spent supporting the customer.

Automated call logging templates and standardized call result options ensure that data from each call is recorded accurately in the CRM, so every account and interaction is up to date for the next time it's needed.

"InGenius is an unsung hero. It's a critical app for our teams because our folks can't live without it. It is part of how we do business now."

KEY RESULTS

PRODUCTIVITY IMPROVEMENTS

For Southern Glazer's Wine & Spirits, time is money. The company focuses on productivity for its key performance indicators. Since implementing InGenius, Southern Glazer's has seen improvements in their inbound call response time and service levels, combined with a reduction in abandonment rate and time in queue. The tools provided by InGenius have resulted in an increase in the call capacity of each agent, allowing both Inside Sales Consultants and Customer Advocates to reach more of their audience.

BETTER USER EXPERIENCE

Inside Sales Consultants at Southern Glazer's are reporting increased satisfaction to their user experience, with the tools now available to them through CTI. The Customer Advocacy team loves InGenius, particularly for screen pop, which makes customer data available at their fingertips immediately when they receive a call.

ACCURATE METRICS

On the Inside Sales team, thanks to call logging, management can now see how many calls are hitting the high targets set by Southern Glazer's customer success standards.

IMPROVED CUSTOMER EXPERIENCE

Using InGenius has created improvements on the customer side for Southern Glazer's. With more time available to spend engaging with their customers via phone, Inside Sales can work with more of their accounts each day, working towards a best-in-class customer experience. Customer Advocates are able to solve problems faster, something that is greatly appreciated when a customer needs help quickly. Southern Glazer's has seen these changes improve their customer satisfaction metrics, including Net Promoter Score (NPS).

MISSION-CRITICAL TRUST

Recording call notes has given Southern Glazer's the ability to investigate potential call fraud and help verify actions. Operating in the liquor industry, adherence to all local laws is critical. Tracking has now been simplified with the InGenius implementation.

"InGenius is a way of life. It helps us protect our people, the company and our reputation, while delivering great customer service."

Some users at Southern Glazer's have now been using InGenius for upwards of five years. In that time, InGenius has become a way of life. Both Inside Sales and Customer Advocacy teams agree that InGenius makes their day-to-day jobs easier, while management can see tangible improvements in both user productivity and customer satisfaction.