

# Case Study

**Company:** McCormick & Co., Inc.

**Region:** Americas

**Company size:** Large Enterprise

**Industry:** Consumer Packaged Goods

**Function:** Field Service, Retail Performance Management



## About Flowfinity

Flowfinity provides a proven, fully customizable solution for building mobile enterprise apps without programming. Since 2000, Flowfinity has helped leading companies across industries empower their mobile workforces in order to enhance productivity, engage management, and improve business insight through all areas of the organization.

## McCormick Improves Retail Operations with Flowfinity

*Improving sales across the country by ensuring merchandising excellence with Flowfinity Actions for Retail Audits*

### Challenge

McCormick, a global leader in spices, seasonings, specialty foods and flavors, uses retail audits to monitor the quality of in-store product displays managed by their merchandisers.

Until recently, retail audits were paper-based, requiring retail operations managers to handwrite their observations and manually enter the data into spreadsheets at the end of the day or week. This system caused significant delays in delivering audit results to sales managers, making it difficult to influence performance at the store level.

The paper-based process also made it difficult to manage the performance of third-party brokers responsible for product merchandising. Due to communication delays and the fact that retail conditions change so rapidly, many opportunities for correcting observed issues were lost.

The U.S. Consumer Products Division, responsible for retail performance in over 28,000 retail stores, also lacked a standardized audit process across the country and so was unable to obtain or leverage valuable data on a national level.

To address these issues, McCormick first selected a wireless solution from another ERP vendor, but severe usability issues prompted them to revert back to paper-based auditing while continuing to seek out an easy-to-use, robust, and automated wireless system for performing retail audits.

***“McCormick needed a standard core audit procedure, where everyone across the nation agreed that this was how they wanted to measure retail execution.”***

- Steve Warrington, U.S. Consumer Products Business Systems Manager,  
McCormick & Co., Inc.

### Solution

#### Flowfinity Actions Automates Retail Audits

McCormick selected Flowfinity Actions as their standard mobile enterprise solution to automate retail audits across the U.S. and achieve sales excellence by monitoring in-store merchandising compliance.

#### Nationwide Audit Procedures Enable Merchandising Excellence

Flowfinity Actions has enabled McCormick to deploy a standardized and adaptable audit process to address core reporting requirements in retail segments across the country. Retail managers in different regions are now able to collaborate on streamlining and improving operations, and audit questions can easily be updated without programming. This gives sales executives the ability to quickly roll out specific audits that focus on new products or seasonal themes.

The ability to make continuous improvements to their audit process and deploy best practices quickly and consistently to every location enables McCormick to achieve merchandising excellence across the country.

## Better Functionality and Usability Leave More Time for Selling

Audit forms are customized to meet McCormick's specific needs and tailored to maximize efficiency, leaving more time for selling activities. For example, forms are separated into specific sections, allowing auditors to walk systematically from aisle to aisle and navigate quickly to the section they are in, saving valuable time.

The quick look-up ability in Flowfinity Actions eliminates the need for auditors to pre-load stores that they plan to visit. Now they can retrieve store data within seconds as they arrive. Connectivity is also no longer an issue, since audits can be completed without a wireless connection.

## More Timely, Efficient Communication Improves Broker Management

McCormick relies on third-party brokers to manage in-store merchandising and promotion of their products. Previously, important feedback about McCormick's key performance indicators could take up to a month to reach the broker.

Now, audit results are available to be shared as soon as the auditor completes them. Valuable, timely feedback enables district supervisors to close the loop by verifying that brokers have taken corrective action when needed.

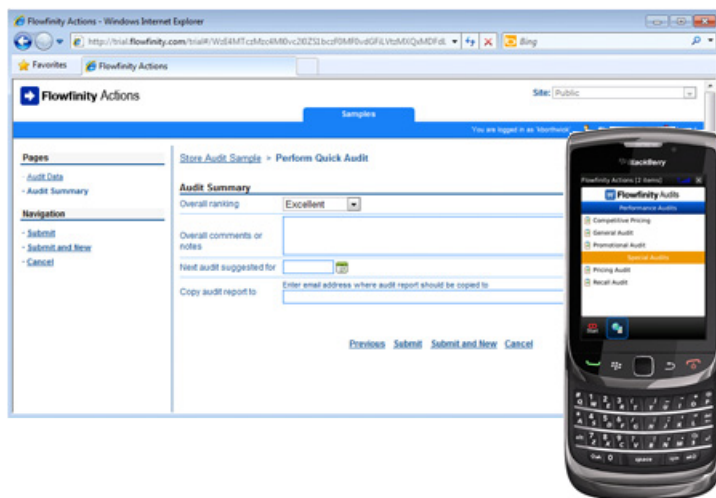
***"With a solid communication process after audits are performed, it allows us to close the loop on current issues, store by store."***

- Rob Santin, Director of Sales, McCormick & Co., Inc.

## Better Quality Data, Automated Reporting Improve Visibility into Operations

McCormick collects high-quality retail data with Flowfinity Actions, which is integrated with an ERP system in a data warehouse to produce timely, detailed reports such as actions required by brokers, top-line score reports for stores, and distribution reports to manage out-of-stocks and performance of top SKUs.

Quality data and reporting is now also fully accessible and traceable. Retail sales managers can take advantage of Flowfinity's server-based 'filing system' to pull results of any previous audit from across the country anytime, anywhere.



## Results

- Improved functionality and usability leaves more time for selling
- Improved broker management
- More visibility into operations
- Audit form adaptability enables streamlining of operations
- Nationwide audit procedures enable merchandising excellence

***"The ease of use really shows how Flowfinity designed the software with the end user in mind. Finding the proper stores at the beginning of the audit is simple and fast, and maneuvering around within the software while performing the audit is equally efficient."***

- Rob Santin, Director of Sales,  
McCormick & Co., Inc.



***"The new reporting system is really fast. All of the audit data is submitted overnight, and can be reviewed by anyone in the sales department, up to daily if needed. Retail managers can download a report, highlight the issues, and disseminate that information to brokers."***

- Randy Sullins,  
VP Trade Relations,  
McCormick & Co., Inc.