

Mobile CRM Solution enables effective market strategy for Unilever

“ The implemented system, allows for the development of a clear strategy for the introduction of new products and widening of the product range according to the individual needs of every client. ”

Marian Georgiev, Country Development Manager

Founded in 1929, Unilever is a British–Dutch multinational consumer goods company co-headquartered in Rotterdam, Netherlands, and London, United Kingdom. Its products include food, beverages, cleaning agents and personal care products. Unilever is the world's largest producer of food spreads, such as margarine. The company is organized into four main divisions - Foods, Refreshment (beverages and ice cream), Home Care, and Personal Care. It has research and development activities in the United Kingdom, the Netherlands, China, India and the United States. One of the oldest multinational companies, its products are available in around 190 countries.

Unilever Bulgaria was established in 1999 as part of Unilever South Central Europe. The company is one of the leaders on the Bulgarian FMCG market.



The CRM project was realized with Microsoft Dynamics 365 for Sales. It covers the company needs on planning of the sales and trade activities, analysis of its and competitors market positioning, automation of the orders, tracking all visits and sales activities, and detailed reporting.

The solution has a back office implementation and a mobile part, used by the sales representatives.

On the mobile part of the solution, the sales representatives have access to the database with all company clients and their locations. They have at hand all the needed information for every client – locations, contact person, phone numbers, category (seasonal or permanent), type (restaurant, hotel, fast food, catering, etc.), products delivered, distributor used and competitors' products.

On the mobile devices the sales reps are able to plan their visits (set a location, date and time), route and define activities – cooking (demonstration with specific products, preliminary selected in the application), merchandising, training on the products usage, presentations (pdf files on the tablet), meetings, etc. They have calendar, where they can follow their planned visits on a daily, weekly or monthly basis.

When the sales rep is making a visit, the planned visit, is automatically converted into a real visit. They can see what the planned activities are and input the real activities performed. The beginning and the duration of every visit is recorded. Unplanned visits can also be entered on the spot.

Orders are taken during the visits and are sent automatically to the main distributor through the back office. The sales reps are able to see detailed reports on their visits – planned or done.

Through the back-office solution all information related to clients, their offices, products, distributors, etc. is managed and updated. Information received daily from the main distributor is automatically input into the CRM system. A very rich set of predefined reports is also available.

SOLUTION OVERVIEW

Unilever Bulgaria

Established in 1999 as a part of Unilever South Central Europe

Industry

Wholesale

Activities

Wholesale of consumer goods under the following brands – Knorr, Hellmann's, Carte D'Or, Lipton, Rama.

Coverage

Bulgaria

Users

Market development, Sales Representatives.

Issues to be solved

The company had limited capabilities to analyze the information on the presence of their and competitors' brands on the market and obtain feedback from their customers. It was difficult to track the activities of their Sales Reps during their visits. The orders were taken on paper and ordered over the phone to the distributor. Very limited reporting was possible and the possibility of human mistakes was too significant. No system to plan the activities was available.

Challenges for the Company

To describe the business processes. To reorganize the structure of the sales team. To arrange with their main distributor the integration of the solution with their system to enable automated mobile orders.

Benefits

The order taking process is automated and the possibility for human mistakes is minimized. The Sales Reps can now plan their visits, the number of the visits and their activities. Their effectiveness is increased, and no customers are missed. Unilever can now analyze the competition and optimize performance. The solution allows for detailed reporting on all sales activities, the whole market picture can now be seen and analyzed.



Unilever