

# Sales B2B Portal

## Manufacturer of Branded Specialty Foods

### Case Study

#### Solution Overview

##### Industry

Manufacturing

##### Architecture

SharePoint  
SQL

##### Products Used

Microsoft SharePoint Portal Server  
2007  
Microsoft SQL Server 2000

##### Development Resources

Encore Consulting Services, Inc.

##### Development Time and Cost

6 months with 2 person team

##### Benefits

Centralize delivery schedules  
across distributors  
Give customers a consistent view  
of available delivery dates  
Reduce manual labor involved and  
errors in data

A \$35 million dollar in revenue, worldwide marketer and manufacturer of branded specialty foods currently operates a B2B information portal for regional managers and brokers who sell their products. This portal is the primary source of sales information for the company's products. This solution was built using Lotus Notes/Domino and suffers from several limitations:

1. Hard to update and navigate
2. Difficult to communicate new topics
3. No event or announcement information
4. Limited security
5. Access to some files required 5 clicks or more
6. No dynamic information: Examples include sales statistics, sales reporting, promotion results, etc.

#### Solution Challenge

The goal of this project was to improve the accuracy and timeliness of the distributor delivery schedule information by allowing distributors to directly maintain the information. The objectives to meet this goal included:

1. Build a user-friendly communication tool for the sales organization
2. All information needed available and easily accessible
3. Increase usage of analytics by the sales forces
4. Better monitor/orient sales force activity
5. Simplify flow of communication
6. Notification when something new is on the site or changes
7. Build a long-term solution that could be implemented quickly and extended over time with more features and functionality
8. Enhanced security down to the individual document level so brokers would only see the information they had access to

#### The Solution

Encore designed and implemented a B2B portal solution using Microsoft's Office SharePoint Server 2007 product. Encore created a 'master' page that branded the site and provided common navigation and look-and-feel. All pages on the site were based on the master page and each provided additional functionality. The benefit of a single

master page is the ease with which to make global site changes and the ability to keep the 'brand' current. The data repository was SQL Server 2000 running on a different system. Features of the system included:

1. Secured, personalized web experience for all the users
2. Provide an common entry point and information source for brokers and Regional Sales Managers (RSMs) to obtain information and services about the company's products;
3. Provide a document repository and distribution mechanism for product-related information;
4. Provide role and location based security to control access to information appropriately;
5. Provide an entry point to other applications that are needed by the user community;
6. Provide a foundation for additional portal applications

#### Benefits

The new system benefited the company with:

- A branded, fresh-looking site with current information for the entire sales organization
- Simplified process for sales management to communicate information to the field and update sales documents
- An extensible system that could be easily added to in the future. Examples include KPI generation, real-time sales reporting, current price list information generated from the company's host system, surveys, blogs, wiki's, etc.