



Microsoft Office System Customer Solution

Case study

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Tim Schultz
 Vice President
 Sarah's Attic

Collectibles Wholesaler Remolds Sales and Marketing Efforts That Increase Revenues and Improve Sales Channel Communications

Sarah’s Attic is a 20-year-old collectibles wholesaler that was seeking to improve its communication processes to better support sales and marketing efforts. The sharing of information was mostly a manual process that sometimes slowed responses to customers and left little time for proactively marketing the business. IT consultant Quanta Enterprises found a solution that is starting to have a significant impact on the business. Using Microsoft® Windows® Small Business Server 2003 and Microsoft Office Professional Edition 2003, Sarah’s Attic streamlined internal communications, reconnected with its sales channel, found new ways to market products, and created a more secure and accessible network. The resulting impact on revenues is estimated to be U.S. \$1.5 million per year.



CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
Located in Chesaning, Michigan, Sarah’s Attic is a wholesaler of collectibles, home décor items, and gifts. The company also creates its own line of collectibles. More than 100 U.S. sales reps make up the sales channel and its customers are retail gift stores like Hallmark and hospital gift shops. The company has 12 employees with annual sales of U.S. \$2 million.	Sarah’s Attic was experiencing three main business problems: inefficient communications between employees and all aspects of the business, delays in getting sales and marketing information to sales reps, and lack of consistency in their approach to sales and marketing efforts targeted to retail stores.	Using Microsoft® Windows® Small Business Server 2003 and Microsoft Office Professional Edition 2003, Sarah’s Attic was able to seamlessly connect employees and support sales, enhance its ability to provide sales information to its sales channel, proactively market additional products to customers, and create a more secure and accessible network environment.	<ul style="list-style-type: none"> More efficient communications directly support sales efforts Sales channel is tightly linked to company resources and timely information e.g. move old inventory faster. Sales and marketing efforts are more easily and systematically pursued; estimated revenue increase of \$1.5 million. Increased security, reliability, and access to the network



Situation

“We have over 100,000 names in our *old* customer database that we have done very little with. We are now beginning e-mail campaigns that feature new products or inventory blowout items. We estimate that we can get an additional \$50 in orders from 10 percent of the database or an additional \$500,000 in sales each year. Publisher 2003 has unlocked new sales opportunities for us.”

Tim Schultz
Vice President
Sarah's Attic

Sarah's Attic is a wholesaler of collectibles, gifts, and home décor items. In addition to sales through gift store channels, Sarah's Attic also has begun an e-commerce initiative to provide direct sales to consumers. The company is privately held with U.S. \$2 million in annual sales and 15 employees.

What began as a mother's dream to earn money for a new sofa for the family's living room has led Sarah Schultz to an exciting and long-lasting career. Sarah's Attic began 20 years ago on the dining room table of the Schultz home in Chesaning, Michigan. In 1983, Sarah was managing the gift department in her husband's pharmacy, where she was also selling her own handmade creations. Not surprisingly, the best-selling products were those she created herself, such as stenciled slates, rulers, and wood cut-outs.

While Sarah was visiting a gift show in Charlotte, North Carolina, her handmade stenciled tote bag caught the attention of a sales representative, who suggested she market her creations.

Sarah's Attic grew significantly from its small beginnings, and it began to experience communications issues regarding its sales and marketing efforts.

The company had two servers, one running Microsoft® Windows® Small Business Server 2000 and another running Windows Server™ 2000. Sarah's Attic has a total of 15 desktop computers and one Tablet PC.

The company was experiencing communications problems in three key areas:

- **Inefficient communications between employees about overall business and sales support issues.** Sales and product information such as tasks, shipping schedules, and deadlines were not easily shared and coordinated

with other team members.

Communication issues also affected the development of new products. The workflow process to get a product from the concept phase to production phase is several months long, and includes people from across the company.

- **Sales representatives were not receiving timely sales and marketing information.** The sales channel was not receiving timely sales support information about new products, updated prices, and inventory status. As a result, the sales process was slowed and, in many cases, the company was losing sales opportunities.
- **Proactive sales and marketing efforts to retail store customers were not happening regularly.** Retail stores were not marketed to systematically and proactively. Sarah's Attic has been collecting customer contact information for many years, including e-mail addresses; however, there was no process in place to use that contact information to market additional products and services to customers.

From a broad view, the business challenges at Sarah's Attic were due to the lack of streamlined and standardized communication processes in support of sales and marketing efforts. Most existing communication processes were, for the most part, manual and cumbersome. Streamlined communications would allow management to make better and faster decisions, shorten the time it takes to resolve customer service issues, increase the ability to market to additional prospects, and shorten sales/production cycles.

Solution



Sarah's Attic turned to the IT expertise of Quanta Enterprises for a solution to its sales and marketing challenges. Microsoft Office Professional Edition 2003 and Microsoft Windows XP Professional were deployed on all desktops and laptops. Microsoft Windows Small Business Server 2003 was installed on a Dell Power Edge Server 1400C.

Employees are seamlessly connected from a communications and collaboration perspective. They can more efficiently share sales and marketing information using e-mail and shared calendars enabled by Office Professional Edition 2003 and Microsoft Windows SharePoint™ Services, an integrated component of Windows Small Business Server 2003. Managing tasks and holding team members responsible for customer support issues are more easily done because of the rich set of features in Microsoft Office Outlook® 2003, the messaging and collaboration client. For example, responsibilities are assigned and managed more easily with the Task views that can track progress by the person responsible or by a task timeline. And the new junk mail filter capabilities in Outlook 2003 are dramatically reducing the high volume of spam.

With Windows SharePoint Services, calendars and contacts can be shared across the company. The SharePoint sites are a comprehensive resource to meet the sales channel needs. Sales reps now have a single repository for updated company, product, and sales information. Further, powerful, proactive marketing materials and campaigns now can be created using Microsoft Office Publisher 2003.

Sarah's Attic managers have a reliable and secure network as a result of Windows Small Business Server 2003. Using Remote Web Workplace, they also have robust 24-hour access for e-mail, Web site, and all files, whether located on the server or their own desktops. IT management tools allow IT consultant Quanta

Enterprises to monitor the health of the network remotely.

Benefits

Internal communications are more efficient and help support sales efforts.

Outlook 2003 has had a big impact on Sarah's Attic in terms of streamlining internal communications that are needed to support customer orders.

"The ability to view e-mails in a number of ways really helps us stay on top of specific customer orders," says Tim Schultz, Vice President. "For example, Arrange By Conversation makes it easy to instantly see all the communications around a specific order and so we can take care of the customer faster."

Other Outlook 2003 features help Sarah's Attic teams to keep on top of customer needs. "The task and e-mail management features in Outlook 2003 really helped us better manage the whole office," says Sarah's Attic Vice President, Tim Schultz. "It's easy to keep track of dozens of customer order needs and manage progress with different views like Percent Completed and Task Timeline. And the Quick Flags make follow-up on an important e-mail a snap. It puts us back in control and helps service our customers better."

Paying attention to the sales channel is also an important priority. The customer support team at Sarah's Attic needed to capture unique information about each of the sales representatives. Outlook 2003 was customized to meet the need for 20 additional data fields that ranged from the sales rep identification code to territory to commission structure.

Shared calendars and contacts are made much easier with Outlook 2003 and the Windows SharePoint Services site. All

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President
Quanta Enterprises

employees now have access to this core information without the concern of not having the latest version of a calendar or contact list.

Another key benefit of Outlook 2003 is the improved junk mail filter. By drastically reducing the amount of junk mail the company's management has more time to concentrate on its customers and running the business.

"I get 15,000 e-mails a month, most of them spam," says Schultz. "Since all of the general Web site inquiries come directly to my computer, a lot of companies have grabbed that e-mail address. The junk mail filter in Outlook 2003 has saved me nearly an hour a day."

Sales channel is tightly linked to company resources and timely information.

One of the most powerful new out-of-the-box capabilities in Window Small Business Server 2003 is the rapid deployment of Windows SharePoint Services sites. For Sarah's Attic, the shared Web site serves as a collaboration hub for the company and its 100 independent sales reps. For example, sales reps can obtain current information about new products being developed, customer mailing lists, trade show calendars, key account activity, customized products, special promotions, up-to-date price lists, and sales tips.

"The value of having a single place where we can interact and communicate with our sales channel is invaluable," says Tim Schultz. "We fully expect sales will increase because we are better connected to our independent sales organization."

Office Professional Edition 2003 readily integrates with the company's line-of-business software applications. Sales information from Oak Street, the company's order management software, is exported to Microsoft Office Excel 2003

where a PivotTable® sales summary helps management to analyze and create inventory and sales commission reports. The reports help management keep better track of the entire sales organization by capturing weekly sales results and are used in the company's regular staff meetings.

Proactive sales and marketing efforts take a leap forward.

Sarah's Attic has discovered that the combination of Windows Small Business Server 2003 and Office Professional Edition 2003 helps the company to communicate more efficiently, giving it extra time to market its products rather than just manage its business. And, doing more with fewer resources is particularly important for a small company like Sarah's Attic that only has 12 full time employees.

"This combination of software has given us more time to proactively sell more products to current customers, something we have rarely done in the past," says Tim Schultz. "We estimate that our four inside salespeople can generate an extra \$20,000 per week or over \$1 million annually. The best part is that we've already seen this kind of weekly increase and know that this kind of return is possible."

Microsoft Office Publisher 2003 is also part of the proactive sales effort. It is used to design and print a 48-page catalog twice each year. New printing features such as support for CMYK composite PostScript and advanced print settings make it easier for commercial printers to fit Publisher 2003 files into the workflow and create color separations directly from the Print dialog box.

Product line specification sheets are produced several times a year with Publisher 2003, using its Catalog Merge feature. Catalog Merge can automatically create a publication that merges pictures and text from a data source like Excel

2003. This new capability in Publisher 2003 is particularly helpful to Sarah's Attic, which has large quantities of text and graphics that frequently change.

Over the years, Sarah's Attic developed a large database of past customers that was largely underutilized. Everyone was busy handling current customer orders, with little time left over to pursue additional selling. As more time became available to sell because customer communications were streamlined, Publisher 2003 provided a powerful way to create regular marketing campaigns quickly and easily.

"We have over 100,000 names in our old customer database that we have done very little with," says Schultz. "We are now beginning e-mail campaigns that feature new products or inventory blowout items. We estimate that we can get an additional \$50 in orders from 10 percent of the database or an additional \$500,000 in sales each year. Publisher 2003 has unlocked new sales opportunities for us."

Company increases the security, reliability, and access of its network.

Through the powerful Remote Web Workplace feature of Windows Small Business Server 2003, Sarah's Attic management is able to have around-the-clock access to e-mail, shared contacts and calendars, and other critical information at both the server and desktop level.

"Having complete access to all files, calendars, and network resources is a big deal for me, especially during trade show season in late winter and summer," says Schultz. "I can still manage the office while being on the road for three weeks at a time."

Regardless of the access point, security is always on the mind of the company's senior management and its IT experts. Windows Small Business Server 2003 automatically provides protection for

Sarah's Attic's network in 15 essential ways. For example, the enabled firewall closes all external ports by default, the Internet Connection Wizard provides a simple path to securely establish an Internet connection, Windows Update keeps the company's software current with security updates and patches, and dangerous email attachments are automatically removed upon receipt.

"Security is made easy at both the IT and user levels," says Bryan Ealba, President, Quanta Enterprises. "Windows Small Business Server 2003 comes with a robust set of security features already turned on to provide maximum network protection right out of the box. And users can rest easy by being able to restore lost files themselves using the Volume Shadow Copy feature."

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