

# Winn-Dixie

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--Pete Martinez, Project Manager

## THE CUSTOMER

Winn-Dixie is the leading chain of retail grocery stores in the Southeastern United States. The company ranks #231 on the FORTUNE 500® list and employs 55,000 associates. They run 525 stores and four distribution centers.

## THE CHALLENGE

### **What it takes to ensure a positive customer experience...**

It’s easy to take for granted the complex web of dependencies that go into making an everyday occurrence like grocery shopping a safe, pleasant, and valued experience. The people who work in a Winn-Dixie retail store must coordinate their activities with several “behind the scenes” departments that are also interacting with each other. These include Marketing, Merchandise, Operations, Facilities, Environmental Health & Safety, and Training.

“Before HyperOffice, there was no centralized way to setup projects and meetings. Each department scheduled activities at their own convenience. None of them could see the impact they were having on the other groups,” says Winn-Dixie Project Manager, Pete Martinez.

### **When worlds collide...**

“Imagine 3 different kinds of audits scheduled for one store, all at the same time! A surprise facilities audit for 4 hours. A surprise safety audit for 5 hours. On top of this, the store’s doing an inventory check. With no disruptions, an inventory check takes 10 hours. Each one demands the store manager’s full attention,” Martinez says.

“An inventory check pulls our retail floor team away from shoppers. This means we have to hire extra staff to tend to our customers. The two surprise audits caused a major bottleneck. The manager had to handle the audits first. It held up inventory and we were forced to eat the cost of idle workers,” Martinez recounts.

## THE JOURNEY

“After this kind of paralysis, we knew we had to do something that gets at the root of the problem,” recalls Martinez. Winn-Dixie formed a project team with people from IT, Retail, and Training.

“We knew the system must be easy for our retail floor staff to use. They work directly with our customers and spend very little time at the computer. Minimal training for them to be productive right away was essential for us,” Martinez states. The team went online in search of a solution.

## THE DISCOVERY

### Looking for solutions

Martinez shares that, “Doing our homework was key. We studied the vendors’ offerings, attended webinars, and took advantage of free trials and evaluation copies where available.” He goes on to say, “This helped us assess things like ease of use, feature set, and even the software-as-a-service model. We paid particular attention to how they addressed our concerns during the trial period. This way, we could get a sense of how strong they are in customer service, technical support, and user training.”

### Evaluating solutions

“We were impressed with HyperOffice. They were strong on all the homework points – product capabilities, ease of use, timeliness of technical support, and quality of user training during the trial period,” remembers Martinez.

For Winn-Dixie, it came down to HyperOffice or Microsoft Outlook Calendar. There were three factors behind Winn-Dixie’s choice of HyperOffice. The first reason was ease of use.

“We had members of our floor staff at different locations try out HyperOffice based on the kinds of things they’d use it for day-to-day. We also had them do the same things in Outlook. They were comfortable with HyperOffice,” Martinez asserts.

Second, Winn-Dixie adds temporary workers to meet high volume periods. That HyperOffice could accommodate users inside and outside of the company firewall, even if they don’t have a HyperOffice account was critical.

Third, the company was already on Microsoft Outlook and Microsoft Exchange and needed a solution that offered deep compatibility with these platforms. With HyperOffice, Winn-Dixie users could switch back and forth between Outlook on their desktop and HyperOffice in a

web browser or handheld device and get the latest email, look up contacts, share calendars, and update project tasks.

## THE SOLUTION

In addition to a short learning curve, there were several other reasons Winn-Dixie opted for HyperOffice.

### **Confirming the ease-of-use factor**

“The user interface of HyperOffice was more intuitive,” says Martinez. “With one click, users could show or hide the events of another department or hide everything except their personal calendar. We’re all busy and this helps us avoid information overload. With Outlook, there’s no clean and easy way to do this,” Martinez relates.

### **Bringing order to the scheduling process**

“Scheduling meetings is no longer a free for all. HyperOffice gives us the ability to check other people’s schedules before we set the date and time of a meeting. The person calling the meeting can check to see who’s accepted or rejected it,” says Martinez.

### **Linking resources to calendar entries**

“Since we installed HyperOffice, people show up for meetings better prepared. One reason is they link projects, contact info, email, and documents to meeting entries. This way, anyone invited to the meeting understands the context ahead of time,” says Martinez.

### **Sharing calendars with the outside world**

Also of vital importance to Winn-Dixie is the ability to share calendar information with non-HyperOffice users. “Whenever we have inventory checks or periods where we expect high store traffic, we hire temps. It doesn’t make sense to give them HyperOffice accounts. Instead, each Winn-Dixie store can use HyperOffice to publish its calendar at a public URL. There, temps see which days the store needs them, and they let us know if they can make it,” Martinez notes.

## THE IMPLEMENTATION

### **Start off with a modest implementation**

Winn-Dixie started with a modest deployment of HyperOffice which involved a handful of stores and departments. It wasn’t long before other stores and departments came aboard. Short training cycles were a factor.

### **Take advantage of just-in-time training**

“Not counting Q&A and chit-chat, our training sessions to get new users up to speed on HyperOffice are 30 minutes tops,” says Martinez. “As a training developer, I know what it takes to produce training for desktop applications and I can tell you it takes hours,” he adds.

### **Accommodate other groups who want to get on board**

As scheduling issues disappeared, other groups asked to join HyperOffice. “Pharmacy saw how much smoother things were going for the other departments. Since Pharmacy is a separate business unit without the regional orientation we have at the rest of Winn-Dixie, we had to make certain we could accommodate their need to share calendars with the rest of the company while maintaining their own private calendar as well. With just a couple of calls into support on how to approach it, I was able to set this up myself with no technical assistance from the vendor,” Martinez explains.

### **Have a scheduling policy**

To get the most from shared calendars in HyperOffice, Winn-Dixie setup a scheduling policy. The policy ranks the relative importance of the various audits. In short, health and safety takes highest priority and gets first opportunity to schedule a store audit. Second in line is facilities and security. With HyperOffice, they can both see when and where the other intends to perform an audit without tipping off the stores.

## **THE RESULTS**

### **See bottom line results**

“With our new policy for prioritizing audits, HyperOffice helps us keep every store complying with the best practices in health, safety and security. We complete our inventory checks on time and we don’t run up avoidable expenses,” Martinez says proudly.

### **No more bottlenecks**

“We’ve eliminated operations bottlenecks in every area. With HyperOffice, each store schedules its inventory checks in advance. The other departments know not to spring surprise audits on those days,” he adds.

As for the future of HyperOffice at Winn-Dixie, Martinez states, “We’re now rolling out HyperOffice to 55,000 associates across all 525 of our retail stores.”