

# Success Story Westons

## Mobile CRM and Sales App for Supplying Pubs and Supermarkets

With the offline-capable Anveo Mobile App, Westons has boosted the productivity of its sales processes by 20%.

H. Weston & Sons Ltd is a producer of Cider and Perry and has been family-owned since its foundation in 1880. In its fifth generation, the company offers a wide range of alcoholic beverages made from apples and pears which are harvested from their own orchards and orchards from the surrounding countryside in Herefordshire, UK. With about 240 employees, Westons exports to more than 40 different countries worldwide generating a turnover of over £60 million.

### Initial Situation

Weston's distribution is organized into off-trade (independent retail) and on-trade (bars, pubs, restaurants). In both segments, sales representatives were on the road **taking orders, either via spreadsheets or as handwritten notes**. All information was then transferred to the headquarters by email or phone to be keyed manually into Microsoft Dynamics NAV. Due to this procedure, the **administrative data input was often delayed or no longer relevant**.

In addition, the Customer or history records of customers was not equally available to all employees. "Soft" but important information about customers' preferences was only stored in the the respective sales person's mind. If this employee were to leave the company, all this information/knowledge would be lost.

### H. Westons & Sons Ltd at a glance

**Year of Foundation:** 1880

**Business Focus:** Production of Ciders and Perries

**Employees:** about 240

**Sites:** Headquarter in Ledbury, Herefordshire (United Kingdom) and since 2012 Australian subsidiaries of Westons World Brands in Perth and Melbourne

**Go-live with Anveo:** Australia in March 2016, UK in September 2017

**Website:** [www.westons-cider.co.uk](http://www.westons-cider.co.uk)



### Initial situation before implementing Anveo

- ⊗ One office day per week for sales reps to update necessary information in the NAV system
- ⊗ Lots of phone calls from sales team to managers due to lack of information in the daily business
- ⊗ Delayed order processing

### Gains through Anveo Mobile App

- ✓ No more office days needed allowing for increased customer-facing time for sales reps
- ✓ Customer information always available
- ✓ Significantly reduced order processing time at headquarters

To avoid this, the field representatives had to spend one day per week at the office updating the information in the Microsoft Dynamics NAV system instead of doing their actual job, active selling or acquisition of new customers.

## Requirements and Solution Process

In order to improve efficiency, remove redundant work and streamline the whole sales process, Westons looked for a mobile solution that is:

- Fully-integrated in Microsoft Dynamics NAV
- 100% offline-capable
- Easy to configure for developers
- Easy to handle for users
- Compatible with the DrinkIT solution

*“Our Microsoft Dynamics NAV experts evaluated different solutions on the market. We finally chose Anveo because the **Anveo Mobile App met all of our requirements and impressed us with its usability**”,* says Carol Stephens, Point of Sale Manager at Westons.

## Main Tasks of the Anveo Mobile App

- Prepare and follow-up customer visits
- Create sales orders
- Access bar plans (On-Trade)
- Monitor competitors on the shelves (Off-Trade)
- Look up appointments and locations

## Project Implementation and Results

When implementing the project, Westons started with the ready-to-use sales app that Anveo offers. Additional features were then identified and the app was configured to meet the individual requirements. In this iterative development process, customizations were repeatedly developed and pre-tested in the UK headquarter.

The first go-live was carried out for the staff of Westons’ Australian subsidiary in 2016. After the successful first test, the solution was expanded and in 2017, the go-live then took place in the United Kingdom as well.

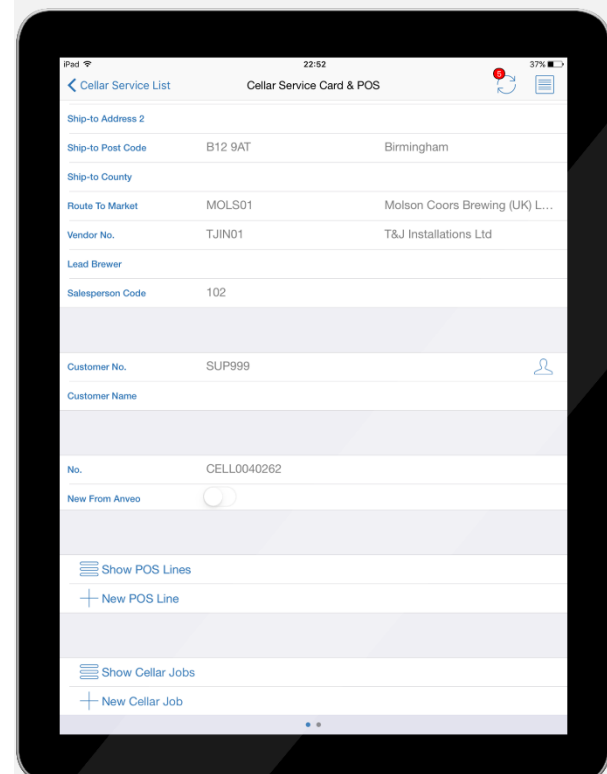
*“At first, our account managers were a little skeptical about the new processes but soon they enjoyed the Anveo Mobile App”,* Carol Stephens remembers. *“They especially appreciate having the customer’s entire history at their fingertips.”*



*“We wanted a fairly basic system and didn't want to make it too complicated for our Account Managers. The more complicated it is, the less it is used. Usability was therefore at the focus of decision-making. The Anveo Mobile App has convinced us because it is very easy to use and had the best look and feel. The level of training needed was minimal.”*

Carol Stephens

Point of Sale Manager,  
H. Weston & Sons Ltd



Customized cellar service card with all needed information for Westons’ on-trade sales staff.

## Summary and Outlook

With the Anveo Mobile App, Westons has **significantly improved efficiency and transparency in its sales processes**. Data can now be entered easily into Microsoft Dynamics NAV while on the road and all important information are available for the sales team anywhere and anytime. **The weekly office day could also be saved which resulted in a higher customer-facing time**. Account managers can now focus on their main duties and no longer have to spend too much of their valuable time on administrative tasks. In addition, Westons' headquarter has been able to save a lot of time in order processing, as the orders are sent directly to the Microsoft Dynamics NAV system via Anveo.

*"There is still a lot of potential for new innovations within the Anveo project" says Matt Aitken, Mobile Product Manager at Westons' NAV Partner [The NAV People](#). "Due to processes and data that were not available for the field staff before Anveo, new workflows are established and new ideas are now communicated within the company. This leads to an even greater increase in efficiency."*

## About Anveo

Anveo offers powerful add-ons for Microsoft Dynamics: The 100% offline-capable [Anveo Mobile App](#) is the perfect solution for sales representatives or service technicians, and can also be customized to every other deployment scenario. [Anveo EDI Connect](#) offers a unique and comprehensive software to exchange data with or within Microsoft Dynamics. With [Anveo Web Portal](#) you will get a simple, web based access to Dynamics for restricted user groups. It can be deployed as customer or employee portal. All Anveo Add-ons are fully Dynamics integrated and enable a self-sustaining handling and configuration. Anveo software supports Microsoft Dynamics NAV 2009 R2 to the current version.



*"We are delighted that Westons was able to save a day a week from each of their account managers to be in the office. Administrative work gets done on the road now which is a huge cost benefit for our customer."*

Matt Aitken

Mobile Product Manager,  
The NAV People

## Do you have any questions on this project?



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