B-to-B Gets Technical

A BRIDE. A CEO. A GRIEVING WIDOWER. YOU TREAT each of these clients differently. Shouldn't you be handling their accounts in separate ways? Technology makes it easier than you think.

Bob Aykens of Memorial Florists & Greenhouses in Appleton, Wis., uses his point-of-sale system to keep track of corporate sales and maintain and update corporate contacts. Aykens uses RTI, but he says it can be done on any floral industry system.

The Big Idea

Treat corporate business as a separate business, he says. "We basically track corporate sales under a separate store number," says Aykens, a member of SAF's technology committee. "So, through RTI, we can print off commercial accounts, and nothing else." He likewise treats weddings, garden center sales, and the Web as separate businesses.

Not only does this system keep Aykens from rummaging through everyday orders to pinpoint corporate accounts, it also gives him a way to increase sales and keep existing clients happy. "Existing customers can be so easy to keep when you use a system like this," he says.

"In the spring, when we do a lot of commercial outdoor plantings, someone (on our sales team) will print out every (corporate client) who did business with us last year for spring plants, how much they spent, what they bought," he explains. Then, employees "call each one, tell them what they bought, see if they want it again, and try to up-sell."

An Added Bonus

The pluses of tracking corporate sales separately via a point-of-sale system don't stop there. Using technology to categorize corporate sales separately can also help you break down how much business you're doing every month by category. Florists can look at December 2004 sales and December 2005 sales and know how much corporate business (and corporate business alone) they do during those months. You also can compare those numbers, see who opted not to buy from you during the subsequent year and figure out if clients are increasing or decreasing spending.

This technology also helps florists plan employee schedules or figure out when the shop might need extra holiday help. "If we notice we did a lot of corporate business at the holidays last year, we can look at that and figure out how many people we need to schedule to work."

Organizing the Masses

Aykens has a designated salesman to handle corporate accounts, which keeps his corporate system from getting messy. Many shop owners aren't as fortunate. When two or three different people, each wearing a variety of hats — designing, answering phones, working the register and making deliveries — have a role in corporate accounts, it can complicate the process.

Chad Kremp of Kremp Florist in Philadelphia offers a solution. While Kremp Florist is a relatively large retail operation, corporate business accounts for a very small amount of the shop's annual sales. "It's an area we're really trying to grow," Kremp says.

Using a shared Microsoft Excel file that lists all the shop's current corporate clients, every employee at the shop can update contacts, and the latest actions taken by corporate accounts. "We can use this simple spreadsheet to send back and forth between all of us here, and we can use it as a reminder," he says. "We want to make sure we're checking in (with corporate clients). Maybe once every couple weeks, someone will call on customers we haven't heard from in a while. We also get on the computer and go to the sheet to see if anything needs to be updated."

On the list, employees at Kremp mostly include corporate clients with either weekly or monthly orders, but "toward the bottom we'll sometimes add prospects," Kremp says. They include the name of the contact at the company, the Kremp employee who's been working with that account, the last time they were in contact and if an order was placed.

For example, Kremp might get off the phone with a receptionist, open the shared Excel file and write, "Called receptionist at ____ company at 1:30 p.m., Thursday. Left a message. Will call back next week."

It helps keep everyone in the loop, he says, and saves the client from being annoyed by multiple calls from the same shop.

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Capture Corporate Business

Bob Aykens of Memorial Florists & Greenhouses in Appleton, Wis., uses his Web site to capture corporate business.

Through the site, Aykens offers a discount to corporate accounts. "We give different clients different promo codes, and if they want to, say, order for an employee anniversary gift, they can enter that code on our Web site and they'll receive some kind of discount." Aykens says he just started the online program this summer and, in a few months, will be able to see how well it's paying off.

— J. H.