

Case Study – Wild Waters

Wild Waters sells Exercise and Leisurewear designed to promote the care and conservation of Ocean Wildlife. The company founders, Christy, Jeff and Mark (Marine Biology Students) came up with the idea while working on an assignment for their Marketing course. Wild Waters donates a portion of their profits to Save the Whales and Cove Guardians, not for profit organizations that promote Ocean Conservation.

Christy continues to serve as the creative genius within the organization. She works with designers to create new and exciting clothes. Christy delivers clothing lines for each season which incorporate top selling items and new items influenced by trends and seasonal colour choices. She attends fashion and art shows to gather ideas. She meets with an advisory group made up of athletes, coaches and sports promoters to determine style and fabric choices. Christy meets with fabric suppliers to ensure that designs are cost effective. Christy currently manages her lists of contacts and meetings on her PDA. Every once in a while she sends Jie a spreadsheet that lists her expenses. Jie adds the expenses to her pay check.

Jeff's area of responsibility is marketing. Jeff works with a team of web developers to maintain the company's web site. Wild Waters' engaging web site currently serves as the company's major attention draw and most orders are received via the website. Jeff manages Twitter and Facebook accounts to help promote Wild Waters. Jeff attends trade shows, sporting events and store openings. He meets with store buyers regularly, looking for creative and cost effective ways to advertise Wild Waters. Jeff develops Sales Forecasts, attempting to predict by week, how much of each product will be sold. Jeff uses Sales History, current sales and feedback from the Wild Waters Advisory Group to develop his predictions. Jeff keeps track of his contacts, meetings, expenses and forecasts on his iPad. He keeps everyone else updated with email.

Mark makes sure that there is enough product in the warehouse to cover prospective orders as determined by the Sales Forecast. Mark investigates the least cost manufacturing solution for each design and orders product based on Jeff's forecasts. Mark works with the warehouse employees on a weekly basis to ensure that inventory levels are at a forecasted level and orders product when inventory is low. Mark also monitors sales of products and watches for products that have not sold as well as predicted. These products are usually reduced in price on the web site and until they are sold out and removed from the line of products offered. Mark uses Excel to keep track of inventory and forecasts.

Naheed manages Customer Orders. Orders are usually received via email or from the website, but can be placed by mail or over the phone. Wild Waters only accepts orders paid by credit card. Naheed checks the orders to make sure that the order has been paid for and then gives the order to warehouse to organize for shipping. Naheed also handles customer requests,

concerns and complaints! To ensure that Jeff's marketing initiatives are successful, Naheed does her best to find out what event or marketing initiative the order is associated with. Purolator is the shipping company of choice, and it's Naheed's job to find an alternative shipping company if Purolator does not deliver to the Customer's address.

Jie was recently hired to manage to money. Jie receives and pays all bills which includes cost of utilities, rent for the warehouse, marketing expenses, and employee payroll. *Wild Waters* uses a Payroll Company to ensure that employees are paid properly. At the end of each month, Jie calculates the company profits. To do this, Jie must have up to date access to funds received from sales and money paid out in expenses. Jie then sends 5% of profit cheques to Save the Whales and Cove Guardians. Jie spends a large portion of her time tracking Christy and Jeff's expenses. Both Christy and Jeff spend a great deal of their time travelling which is expensive. Once a quarter, Jie also calculates HST payments and remits the HST balance to the government. Jie is always worried that a miscalculation in company profits will result in not being able to pay the bills! Jie currently uses Quickbooks to keep track of expenses.

Kumar keeps the technology infrastructure of the organization running. He works with Jeff and the company that maintains *Wild Waters* website to ensure that the web site is always available. He ensures that Naheed is always able to access orders received via email and the website. He interfaces with the company that supports technology hardware and is even the person that everyone calls when a fork lift breaks down! Kumar maintains lists of service issues and keeps track of warranties. He schedules preventative maintenance to ensure that all equipment is running a peak efficiency. Kumar is jokingly referred to as Mr. Post-it, he keeps track of most of his service requests using post-it notes!

Business is booming!

Christy's designs have really caught on in the marketplace. Jeff has secured large contracts to supply a leading North American wide department store chain with seasonal *Wild Waters* product. An additional warehouse was leased last spring to store off season product which is giving Mark and his warehouse staff the additional headache of another building to keep track of!

Naheed, has a team of customer service representatives (CSRs) working for her. Her CSRs are doing a great job, but always worry that an order will be lost with the increase in number of orders.

Christy and Jeff are notoriously awful at submitting expense reports to Jie. Jie is always concerned that her profit cheques to the charities will be too high, reducing *Wild Waters* ability to pay their bills. The increase in staff has also added to Jie's workload.

The increase in staff to manage the business, has added to Kumar's workload. He has two technicians working for him to manage service requests, while he focuses on supporting the website and customer service. Kumar's staff is also responsible for supporting the machines used to automate some of the warehouse processes.

Christy, Jeff and Mark have decided that Wild Waters should invest in a centralized computer system to aid in Finance, Customer Service and Inventory Control. The new system must be able to support Christy in her design efforts and Jeff in his marketing activities and help Kumar keep track of requests for Information Technology support.

They would like to invest properly now in a system that will work for many years and provide flexibility and reliability for the foreseeable future.