Earthbound Farm Gains Real-Time Data Visibility with QuickBase CRM Application

The Challenge:

- Customer database required approximately 160 staff hours each year to update.
- Weekly sales report generation and distribution took an estimated four staff hours each week.
- Excel spreadsheets didn't provide insight into sales activity.

What started out as a 2.5-acre organic raspberry farm with two founders in 1984 has grown to become one of the world’s largest growers of organic fruits and vegetables for retail sale. Today, Earthbound Farm employs 1,000 workers and is a grocery staple for millions of people who purchase the brand daily.

With rapid expansion, however, came a common business challenge: managing a web of disparate sales and customer data across the business, which included a regional network of sales managers.

The company had a database of 2,200 grocery customers and contacts in the United States that required ongoing updates to capture changes from regional sales managers to ensure successful, accurate CRM outreach programs. The company also struggled to manage sales report data that came in from regional managers and needed to be consolidated for executives.

The company tried managing the customer database with Microsoft Excel, but this required as much as 40 staff hours each quarter for updating and didn't provide any solution to the problem of compiling and sharing weekly regional sales report data—a task that took about four staff hours each week.

“Our contact database really deteriorated because it was not getting updated accurately, and we were frustrated by how much time we were spending on tasks that were not delivering the best value to the company,” said Sherry Parsons, Earthbound Farm’s executive administrative manager.

QuickBase Simplicity and Automation Streamlines CRM Efforts

The Solution:

- QuickBase CRM greatly reduces time spent completing database management tasks.
- Critical sales and customer data are easily visible in one application.
- CRM and ERP systems are integrated for more business insight into productivity and workflows.

When Earthbound Farm’s senior software development manager read about a company that had developed hundreds of applications with QuickBase, he felt like it could provide a better solution than Excel for managing his customer database and sales report data.

Management evaluated both Salesforce and QuickBase. When the applications were tested with Earthbound’s sales team, employees reported that Salesforce offered far more functionality than they needed, making the application seem overwhelming—not to mention significantly more expensive. The company chose QuickBase because of its simplicity and the ability to customize the CRM application to the right size for Earthbound Farm. And it liked the fact that QuickBase only required a monthly subscription fee that was just 12% of the monthly subscription fee of Salesforce.
“Our needs were simple: to create a CRM system that managed contact information and some basic activities related to those contacts, and QuickBase fit the bill—and our budget—perfectly,” said Parsons.

Earthbound Farm used QuickBase to develop a CRM application that married its customer database with its weekly regional sales report data. When the CRM application was deployed, its value was quickly apparent. For starters, the update of the customer database was simplified. Regional managers were able to update their own contacts, eliminating the need for additional staff resources to be utilized on the task. All that was required was an email notification as a reminder.

Generation of the weekly regional sales report was streamlined, as the data needed was easily extracted and compiled from the CRM application and automatically emailed to a predefined list of recipients each week.

Perhaps most important, Earthbound Farm had newfound insight into the business now that customer and sales information was compiled into one application and historical data was in clear view. And the CRM and ERP systems were seamlessly integrated, so the resources and time associated with projects and sales could be accurately tracked and managed.

The transition to the QuickBase CRM solution was easy—even for non-technical employees. And minimal training was required to get users working productively on the system.

Taking advantage of the QuickBase platform and unlimited app model, Earthbound Farm developed and launched several other QuickBase applications specific to unique business processes, managing everything from IT helpdesk requests to the employee review process to vendor scorecarding.

**Earthbound Farm Enjoys Better Data Visibility in Less Time**

**The Results:**
- Estimated savings of 160 man hours yearly on customer database updates and four staff hours weekly on sales report generation versus existing solution.
- Saved 88% by choosing QuickBase rather than Salesforce.
- Achieved real-time access to sales and customer data, enabling faster responses to customers and better business decisions.

Since deploying QuickBase CRM and other applications, Earthbound Farm is enjoying more productivity and better data visibility—and quite a bit of cost savings. In fact, Earthbound Farm estimates that it saved 88% in CRM application costs by choosing QuickBase over Salesforce for the same number of users.

But time savings was the biggest benefit the company realized. The estimated 160 staff hours each year that was spent updating the customer database has been eliminated. And sales report generation has been completely automated, saving the company approximately four additional staff hours each week.

CRM efforts are more productive now that client meetings, emails, phone calls and sales activity are centralized and integrated with the ERP system. Plus, since QuickBase applications are easily customizable, Earthbound Farm continues to evolve the CRM as its business needs change.

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1. Savings based on 3/2011 comparison of Intuit QuickBase vs Salesforce Sales Cloud Enterprise version. Savings based on monthly subscription fee with 50 users. Sales Cloud Enterprise version was used in the comparison since API access was a requirement for Earthbound. Salesforce Sales Cloud Enterprise version includes more data and file storage than Intuit QuickBase which is included in comparison price. Pricing may vary. Check with provider for current pricing.