The Challenge:
- Excel spreadsheets didn’t scale and were too time-consuming for a small staff
- Couldn’t evaluate effectiveness of CRM and sales with one-dimensional data views
- Needed to manage and track growing schedule of in-store demos
- Static spreadsheets couldn’t be easily shared or accessed remotely

The Solution:
- Online database delivered detailed views into CRM and inventory data
- Purchase-order module gave insight into product sales
- Scheduling functionality streamlined in-store demo scheduling and inventory management
- Web-based functionality delivered remote access to customer and sales data

The Results:
- Galaxy customer base grew by 20 times without adding staff, saving approximately $50,000 per year in personnel and management time
- Saved 40 hours per week in data management
- Increased capability to perform as many as 200 in-store demos per month
- Productivity remained intact when business owners were on the road

Granola Manufacturer Gets CRM in Stellar Shape with QuickBase

If you could choose, would you consume one cup of oil or three apples with your granola? The owners of Galaxy Granola have high hopes that most consumers would choose the apples. And they may be right, because customers of Galaxy Granola’s applesauce-baked granola snacks have grown 20-fold in the past three years and now include major grocery chains such as Whole Foods, Wegman’s, Giant and Hannaford.

It’s a simple concept that’s driving Galaxy’s success: granola baked in applesauce instead of oil, resulting in a 70 percent reduction in fat that doesn’t compromise taste. Unlike its competitors, Galaxy Granola’s snacks are made by hand with organic and all-natural ingredients, using only fruit and nuts to flavor its treats.

But with the sweet taste of success came the bitter challenge of managing a growing customer base and sales data with Excel spreadsheets. While the spreadsheets worked fine when Galaxy had only a handful of local customers, the system quickly became unwieldy as their customers increased and the number of records that needed to be managed grew.

“In Excel, as our data grew, all we had was a long list and all we could do was sort it. We couldn’t drill down into the data to get useful information,” said Luke Winter, one of the three partners who owns and operates the business.

What Winter and his partners couldn’t do with Excel was cross-reference different pieces of data within the customer records to better pinpoint areas where the company was doing well versus areas where intervention was needed. Specifically, they needed to know which stores their granola was in, how much inventory there was and how well that inventory was selling. Additionally, they needed to track all store interactions and manage the scheduling and logistics associated with in-store demos, a primary marketing activity that Galaxy relied on to grow its sales.

“Looking at our data in Excel was very one-dimensional, when what we needed was to be able to see it from many different angles; but the system just didn’t support that,” Winter said.

Productivity with Excel also was a challenge, since Winter and his partners did not have a support staff. As a result, the owners struggled to keep up with the task of managing the Excel data.
Winter estimates that he spent 10 hours each week inputting data and managing the spreadsheets. "It doesn’t matter how good you are in Excel, it’s just not meant to be used as a database,” Winter explained.

Multi-Dimensional Data Views Replace One-Dimensional Spreadsheets

Winter and partners looked at FileMaker and Access, but felt those database solutions would require too much programming to get the functionality they were seeking. After some online research, they happened upon Salesforce’s web-based CRM and Intuit QuickBase’s online database to replace their Excel spreadsheets. While they thought that Salesforce had a slick user interface, it was the customizability of QuickBase that won them all over. They used both applications for one month before ultimately choosing QuickBase.

“We were instantly attracted to the fact that QuickBase would let us set up our views in a completely customized way, so we could see our data the way we specified,” said Winter.

They used QuickBase to build an online database application to record and manage customer contact activity. They built the application from scratch, a process that took only two weeks, and imported the Excel data into the new application.

The database gave them the robust CRM functionality needed to track and manage contact with stores along with inventory type and status. Winter and his partners also built a purchase-order module to track current and past order histories, so they can see where their products are doing well and where improvements can be made—or where follow-up may be needed.

Within the scheduling functionality of QuickBase, Galaxy developed a system for scheduling and managing in-store demos—and ensuring that inventory for those demos was available and on-site. Because QuickBase is a Web-based application, Winter and his associates also can manage their business while they are on the road, maximizing their productivity.

“QuickBase gave me an application that’s very customizable and flexible and that produces information in ways that are useful to me, which is a major improvement over Excel,” said Winter.

Galaxy Sees Success—and Sales — Growing Out of Sight

In the year since Galaxy Granola has transitioned from Excel spreadsheets to QuickBase – for their online database and specifically CRM needs, a lot has changed—for the better. According to Winter, Galaxy has been able to grow its store base from 100 to 2,000 without having to hire additional personnel, an achievement that would not have been possible with the Excel spreadsheet system he and his partners were using to run the business.

“If we didn’t have QuickBase, we would have certainly lost customers, because we would not have been able to manage those relationships properly,” he said.

Winter estimates that he now needs only five hours a week to manage data for 2,000 customers, compared to over 10 hours to manage 100 customers with Excel. The time-savings has resulted in improved productivity that has allowed Galaxy’s owners to spend more time on customer-facing activities, like in-store demos and store visits, which they believe has been instrumental in growing the business so quickly.

With less time consumed by data management, they have more time to devote to scheduling in-store demos, and now schedule as many as 200 per month. “There’s no way we could have accomplished the kind of success we’ve had if we still were using Excel,” says Winter, “It would have been a nightmare because we wouldn’t have been able to get the usable information out of it that we needed.” They have also been able to tap into QuickBase to track sales history back to the demos, so they know how effective the events are in terms of revenue.