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In the increasingly complex and competitive beverage alcohol distribution business, the more information a sales force has at its disposal when it goes out into the field, the better. One North Carolina beer and wine wholesaler, Mutual Distributing, recently began using a solution to make sure this was the case with its team.

Mutual Distributing Company is a statewide beer and wine wholesaler serving more than 14,000 customers. By acquiring other wholesalers over the years, the company has expanded its distribution territory to cover all of N.C., and employs more than 500 people in seven locations throughout the area.

For nearly two decades, Mutual has gained insights into its sales operations through Dimensional Insight's business intelligence solution, the Diver Platform, which provided its sales force and management teams with access to critical goal and quota data via web-based dashboards. Over the past several years, however, Mutual Distributing Company realized that it needed a way to bring this valuable information to its sales team in real-time and allow them to have access to the meaningful data on the road via any mobile device or tablet.

“As a company, we realized the advantage of giving our sales force accessible data on-the-go and the immense value of having this type of information right at their fingertips,” says Jim Staton, Mutual’s vice president of information technology. According to Staton, when it came to finding the right mobile business intelligence solution, Mutual was on the hunt for a content management application that could organize and distribute spreadsheets, PDFs and presentations that their sales force could reference as a guide while in the field. “So, when Dimensional Insight presented their DiveTab solution that did just that, we felt comfortable moving forward with the product given our success with their Diver Platform,” he says.

The mobile business intelligence platform, DiveTab, was designed to deliver a powerful suite of content delivery and management capabilities with the goal of allowing end-users to access it on any device or tablet. For Mutual, the solution allows their sales team to download different types of documents such as PDFs, spreadsheets, Word documents or PowerPoint presentations that can serve as points of reference during a sales meeting. For example, price lists can be downloaded and then broken down into the metrics the salesperson needs, whether that is beer pricing lists, promotion pricing lists or a whole price list.

To host the DiveTab software, Mutual decided to use iPad Minis as the go-to device because of the stability and ease of use of the Apple iOS operating system and the convenient size of the mini screen. The goal was to make sure the devices were small enough for their sales force to easily handle, yet large enough to effectively display information to their customers. Once the hardware was in place, “that’s where DiveTab came in,” Staton adds.

During the implementation, Mutual wanted to first provide more information to their sales team, focusing in on five primary capabilities: (1) the distribution of documents, forms and price lists; (2) the distribution of presentations that salespeople could show their customers; (3) the availability of dashboards to show salespeople how they were progressing with goal attainment; (4) the ability for salespeople to conduct data analyses; (5) the ability to directly share information with customers. “DiveTab made all of those things possible,” says Staton.

By early 2015, Mutual was up and running with all of its salesforce using the platform on their devices. According to Staton, there was more behind the selection of DiveTab than that they were already using the Diver Platform. DiveTab supports both Windows and iOS operating systems, and provides the ability to manage content and gain insights through data analysis. “We didn’t have to worry about going out and getting another vendor in order to distribute documents. We could do everything through DiveTab, and at the same time, we were provided with data analytics capabilities,” he says.

In addition to the content management capability, DiveTab also provides the opportunity to take a data set and drill into various pieces of the data, similar to that of the Diver Platform, but with the ability to do so from any device. Through data analytics, Mutual was able to dive deep into the data that related to goals, quotas, market price lists, territory, customers and daily orders.

For Mutual's sales force, this meant having the ability to compare sales performance month-over-month or year-over-year, to look at how a product from a specific region is selling overall, to see how certain products are performing within sales territories and to view which orders are coming through. With orders being updated every minute, their sales teams are able to get information almost immediately and see where sales stand in real-time. Additionally, they were able to examine the number of customers a salesperson is taking orders for or how much money the company has accumulated for the day.

According to Staton, the biggest benefit of using DiveTab is the improvements he has seen in overall communication for their sales team. "Before using DiveTab, our sales force was unable to receive updates on their goals on an immediate basis, causing a lot of back and forth between the supervisor and the sales person. Now, they can look at their iPads and are able to have the information right in front of them so that they know how their days are progressing, where they stand with sales and goals, and how their customers are doing.

"The benefits of DiveTab are enormous all the way around," he adds. "For IT, it has provided a level of flexibility and the ability to rapidly deploy effective and scalable business intelligence. And for our customers, we have been able to provide more targeted information in a timelier manner. That all adds up to increased sales and satisfaction."