



GREENE'S RESERVE CASE STUDY

Within 5 minutes, new buyers are onboarded, and have placed their first order, all inside Zoey's portal

The Company



Greene's Reserve

Founded in 2020, 19 Employees

www.greenesreserve.com

What They Like About Zoey

1. They can have a new customer set up, and have them place their first order, in just a few minutes.
2. Customers are able to order and reorder themselves, freeing their sales team to work on acquiring new distribution locations.
3. With this model they can acquire the necessary permits in real time as well, reducing a hurdle to getting started with a new client.
4. Zoey is specifically focused on B2B, making selling in volume easier than other platforms designed for direct to consumer sales.
5. They successfully linked to other software they use without costly integrations.

The Challenge

Greene's Reserve is a new business, growing rapidly, and needed digital wholesaling tools to make managing their growing buyer base easy and efficient. After evaluating solutions like Shopify Plus, they quickly decided that Zoey would be their best solution for managing the ramping up sales they were generating.

The Success

- Their sales team was rolled out on Zoey within weeks, activating distributors and stores in real time as they launched new distribution points
- Salespeople are able to capture the permits/certificates required to activate new stores while on site, eliminating delays verifying them
- The stores selling their product are given the ability to place reorders on their own, without sales intervention
- For larger accounts with multiple stores, they set each store up using Zoey's multi-buyer accounts system, for easier order management and tracking.

What Makes Them Special

Greene's Reserve is using a more traditional model (tobacco sales) to sell in a new product category, hemp snuff. With no nicotine or tobacco in the product, and by steering clear of carcinogens, they look to offer a healthier alternative to what's been on the market in the past.



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By the Numbers

LESS THAN

5

MINUTES TO ONBOARD A CUSTOMER
AND PLACE THE FIRST ORDER

LESS THAN

4

MONTHS FROM SELECTING ZOEY
TO ORDER PORTAL SOFT LAUNCH

Preparing for Exponential Growth

Greene's Reserve was just getting started, but they knew they needed to put systems in place to manage what was already beginning to build in terms of production, sales, and distribution partners.

That growth, according to Jeff Greene, CEO of Greene's Reserve, was happening at a breakneck pace. "We went from ordering 10 boxes of cans to buying 25 boxes of cans; the next week I bought a tractor trailer load of cans, 600,000 cans," he said. "We went from a batch of flavor to a pallet of flavor to a half a truck of flavor. We went from ordering hemp in 37 pound bags to super sacks."

As part of the rapid growth, the company needed an easy way to capture sales from their growing list of stores and distributors, so they can link to their accounting, inventory and CRM solutions.

Initially, they evaluated Shopify Plus. However, he found that it wasn't what they were looking for, particularly since they were purely focusing on B2B sales, and not selling directly to consumers.

Greene said, "Shopify Plus was more B2C and Zoey was more B2B, and B2B was what we were looking for. Being able to have our stores or distributors order or reorder themselves was very attractive. I like getting the sales people out of the way when possible."

Opting In With Zoey for Success

Greene had previous experience working with another company focused in the industry, and seeing how they managed to scale up delivered clear lessons. So, he developed a list of things he knew he would need, particularly around how distributors and stores would order, and how their salespeople would need to work, and began to look around. He quickly settled on Zoey.

"When I put down these are the things I want in software, Zoey checked every box. That doesn't happen very often," he said.

Greene credited Zoey's sales and implementation process of being a key part of making the launch on Zoey successful, and an important part of what made Zoey a great choice.

"The implementation team has been a godsend on getting through the nuances of the system," he said. "To be honest, without them it would be a completely different experience."

In Their Words

“I think if you’re trying to close that gap between your guys out on the street and your manufacturing and your logistics team, Zoey’s a no brainer. When I put down ‘these are the things I want in software’, Zoey checked every box. That doesn’t happen very often.”

Jeff Greene, CEO, Greene’s Reserve



Having initially soft-launched the order portal in April 2021, by summer they were onboarding much larger clients with higher volumes.

Onboarding Customers in Minutes

Initially, Greene was in part drawn in by Zoey’s app, and the ability for salespeople to capture orders while on the go. But he quickly realized another Zoey feature that would help even more: The self-service order portal.

“As we got into it more, it seemed like the sooner we could get the customer involved, the better,” he said. “By doing that online, it just made more sense - it’s not rocket science. We set Zoey up properly, and set our products up so it’s easy to figure it out. Our customers have been very efficient. It’s always fun to wake up each morning and see the orders.”

Part of the process of getting customers to use the online ordering system, powered by Zoey, is how new customers are signed up. A salesperson sets them up, in person, in real time.

“What we’re doing is having all our salespeople go in as if they’re the client,” Greene said. “The salesperson is communicating to the team at the office so the account can be approved, and is assigned to the salesperson. “It seemed easier for us. Whether we set that password and reset it, or have them set the password themselves, it happens live at the point of transaction. It also gives us the ability to get that reseller certification or hemp permit.”

Each store orders a starter kit as their first order; this also gives the salespeople the perfect opportunity to have that client then log in with them and place the order together. In that way they’re getting their first shipment placed, and learning how to order in the future.

From there, Greene said they can watch carefully to see whether a client reorders, and when. “Our salespeople are tracking resales. If they haven’t ordered after two weeks, the salesperson calls, making sure the product is on the shelf and generating sales. We always let them know it’s as simple as going to the site and reordering whenever you want to.”

They’re also making other reorder sizes available so stores have flexibility in ordering what they need, as they need it.

In Their Words

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Jeff Greene, CEO, Greene’s Reserve

Fully Integrated Solution

Greene knew that the growth would be quick based on how things were already going. So they wanted to be prepared. This included everything from production to sales to fulfillment.

“We scaled last week [at the time of the case study] from 600 cans a week to 2,000 cans a day,” he said. “That’s why we went to 19 people. The next step is going to be going to 8,000 cans a day, with a 21 person second shift. Right now we have a 12 person first shift and 7 executives. We will go to a 21 person second shift, and a 21 person third shift, if we continue to need production.”

To prepare for this expected growth as the company further establishes itself, they decided to make sure they had all of their tech solutions, Zoey included, lined up and integrated together, with Zoey at the center of the tech universe with their orders.

“What we have been doing is we’ve integrated a lot of tech already,” Greene said. “ZOHO is our CRM, we have Zoey for orders, and we have Shipstation for fulfillment. We’ve got UPS plugged in to all of this; we use UPS Surepost for USPS. We’re going to be introducing Finale Inventory as soon as our building is built so we can get inventory totally set together.” All of these solutions have existing integrations with Zoey, and all of them are easy to set up and use together.

They also have leveraged the Zoey-developed QuickBooks Online integration, to manage their accounting, with Zoey order data flowing to QuickBooks Online, and payments recorded in QuickBooks flowing back to Zoey.

For Greene, having everything interconnected, and Zoey at the center of the universe, has proved a valuable investment. “I think if you’re trying to close that gap between your guys out on the street and your manufacturing and your logistics team, Zoey’s a no brainer.”

About Zoey

Zoey is a powerful eCommerce solution for B2B and wholesale businesses. We offer three major solutions to run a business: A mobile app for taking orders on the go, a self-service web portal for eCommerce, and a web-based admin for product, customer and order management. Our features include net terms and credit limits, sales quote generation, customer groups, access restrictions, and quick order capabilities.



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