



## Fresh Meal Startup Ramps and Manages Business with the Help of Customized CRM

### Overview

**Country or Region:** United States

**Industry:** Foodservice

### Customer Profile

Zone Cuisine, of New York City, provides a fresh-meal delivery service for individuals following the Zone Diet. The company employs approximately 50 people and serves customers in the Manhattan area.

### Business Situation

Zone Cuisine founders wanted a customer relationship management system that would allow centralized access to customer data, integration of key business functions, and personalized customer service.

### Solution

Zone Cuisine deployed a customized version of Microsoft® CRM. The system is accessed over the Web by employees at Zone Cuisine, its sister company, and its regional kitchens.

### Benefits

- Fast implementation for rapid startup
- Consistent data for better service
- Better reports, better decisions
- Enhanced customer relationships
- Cost-effective growth

“Using Microsoft Business Solutions, smaller companies like ours are able to obtain big-company capabilities at small-company prices.”

Emanuel Mamzellis, Chief Executive Officer, Zone Cuisine

Zone Cuisine prepares and delivers fresh meals that are compliant with the Zone Diet. Starting out in 2003, the founders of Zone Cuisine sought a “backbone” information system that would allow them to centrally store information on customers, meals, inventory, delivery schedules, transportation, and more. Teaming up with Microsoft® Gold Certified Partner Catapult Systems, Zone Cuisine selected Microsoft CRM, a full-featured customer relationship management system that Catapult customized for Zone Cuisine. The fast (four-month) customization effort helped the founders launch the business quickly, and they’ve been impressed with how easy it is to mold Microsoft CRM to the business. Daily Microsoft CRM reports help managers make better decisions about menus, marketing, and future growth, and the detailed customer information helps deepen customer relationships.



## Situation

Founded in 2003, Zone Cuisine is an innovative startup company that specializes in preparing and delivering fresh meals that are compliant with the Zone Diet, created by Dr. Barry Sears. Zone Cuisine is headquartered in New York City and employs approximately 50 people. The company currently delivers meals to the New York City tri-state area and is considering expanding its distribution to other United States cities.

As a startup, Zone Cuisine wanted to create a core IT system that would house customer data, meal information, delivery schedules, transportation resources, billing and payment histories, and other data critical to the business. The founders realized that automation was crucial to the company's ability to communicate with contract kitchens, drivers, prospects, and customers in a timely and efficient manner. Menus needed to be planned centrally and sent to kitchens, which prepares, packages, and distributes the meals with food labels, delivery instructions, and individualized menus. The system also needed to manage drivers, driving routes, and other logistical information.

Zone Cuisine also wanted to use the system for sales and marketing—helping managers understand which areas of the country leads were coming from, which marketing methods were most effective, and so forth.

Customer closeness would be critical to a personalized service like the one Zone Cuisine planned. The company wanted the system to store many different categories of customer information, from basic contact information to medical history, food allergies and preferences, preferred delivery times and locations, and personal information such as birthdays and children's or pets' names.

The information in the system would need to be shared with other companies and locations. Zone Cuisine has a sister company, Zone Labs, which sells Dr. Sears products such as fish oil, nutrition bars, shakes, skin care products, and books. Because some Zone Cuisine meals make use of Zone Labs products, Zone Cuisine sales and administrative staff needed to share information with Zone Labs staff as well as with regional kitchens preparing the meals. Customer information such as allergies and food preferences needed to be accessible from all these locations.

Finally, Zone Cuisine wanted a system that would be easily expandable to other locations, as the company added more customers and more regional kitchens to serve them.

## Solution

One of the Zone Cuisine founders had a computer systems background and wrote a detailed technical specification of how she wanted the system to operate. When it came to selecting its information system, Zone Cuisine knew that it needed a system that had customer management at its core. From there, the criteria broadened to include:

- **Easy customization without compromising support.** Zone Cuisine knew that any off-the-shelf customer relationship management (CRM) system would require a great deal of customization to meet its needs. It also knew that the alternative—building a completely custom solution—would be prohibitively expensive. The founders wanted a system that would accommodate rapid customization, for fast time-to-market, without compromising the integrity of the core product so that they could take advantage of ongoing upgrades and support.

- **Low cost.** Because it was a startup, Zone Cuisine needed a cost-effective solution that would allow the company to get its business up and running on a shoestring budget.
- **Easy integration with call management system.** Zone Cuisine was in the process of deploying the Ineto call management system (later purchased by Siebel and now called Siebel Contact OnDemand) and wanted a CRM solution that would easily integrate with it.

After looking at several alternatives, Zone Cuisine selected Microsoft® CRM, a full-featured, modular solution targeted at companies seeking to automate and more tightly integrate their sales and customer service processes. Microsoft CRM was one of two CRM solutions Ineto integrated with; it provided a very flexible platform that accommodated the customizations that Zone Cuisine would require; and its cost was attractive.

Zone Cuisine collaborated with Microsoft Gold Certified Partner Catapult Systems of Austin, Texas, to customize Microsoft CRM to its needs. Catapult was able to quickly and easily extend the functionality of Microsoft CRM to manage customer medical history, program selection, meal exclusions, meal menus, delivery schedule, and payment history.

“Working with Catapult allowed us to develop a robust capability in a short period of time,” said Pat Szicklai, Chief Operations Officer of Zone Cuisine. “They are highly professional and have been extremely responsive to our requirements.”

Says John Wilson, Senior Consultant at Catapult Systems and lead developer of the Zone Cuisine CRM system, “Microsoft CRM is extremely easy to customize to a variety of business needs. The integration between the

core Microsoft CRM product and customized modules is so seamless that customers can’t tell where Microsoft CRM stops and the customizations begin.”

Microsoft CRM is also seamlessly integrated with the Siebel Contact OnDemand call management system. When individuals telephone Zone Cuisine, they specify whether they are new or returning customers.

When a customer calls in to sign up for the Zone Cuisine service, a CSR walks the customer through a detailed information-gathering session in which the CSR captures basic contact information, medical history, program selection and duration, food allergies, meal replacement options, delivery schedule, and billing details. Data for each of these areas is captured using a different custom module created by Catapult; all are seamlessly integrated so that the CSR simply sees different screens in Microsoft CRM.

Returning customers call in regularly to ask about upcoming menus, request menu item changes (“I’m tired of broccoli!”), inform Zone Cuisine of a vacation absence, ask about billing, and so forth. These changes are also easy to log using Microsoft CRM, with the added value of being recorded centrally for Zone Cuisine, Zone Labs, and kitchen staffs to reference.

Kitchens run meal labels directly from Microsoft CRM; these labels contain up-to-date information on customer food requirements (such as “provide substitution for shrimp scampi”) and delivery instructions (leave meals on back porch; watch out for neighbor’s pit bull). The kitchens also pull daily meal preparation orders from Microsoft CRM, with directions, for example, for preparing 105 Western omelet meals with no ham, 200 with no cheese, 20 with peaches instead of blueberries on the side, and so forth.

“As our business grows and develops, we have ability to change Microsoft CRM to keep pace. We can add new modules, new reports, new data fields. This system will evolve with our business.”

Emanuel Mamzellis, Chief Executive Officer,  
Zone Cuisine

Zone Cuisine hosts its implementation of Microsoft CRM on a single server running the Microsoft Windows® 2000 Server operating system and using the Microsoft SQL Server™ 2000 database. Both Windows 2000 and SQL Server 2000 are part of the Microsoft Windows Server System™ integrated server software.

### Benefits

By basing its customer relationship management system on Microsoft CRM, Zone Cuisine has been able to manage far more than just customer relationships—it has been able to integrate billing, delivery scheduling, and other business functions into the same system. Microsoft CRM is flexible enough to allow easy expansion and further customization to meet future needs. The system works the way Zone Cuisine works, giving managers up-to-date information to help manage and grow the business. A wealth of customer data at everyone’s fingertips allows Zone Cuisine employees and partners to share the same information when talking to customers and also speak personally to customers, deepening customer relationships and loyalty. For example, a CSR might be prompted from her notes to ask a customer, “Did your son win his baseball tournament?”

### Fast Implementation for Rapid Startup

The robust capability of Microsoft CRM has provided the majority of functionality required to manage Zone Cuisine leads and customers throughout the entire sales process. As a result, custom development efforts by Catapult focused solely on automating the business processes that were unique to Zone Cuisine. This reduced overall development time and resulted in a cost-effective approach for a startup company. Development of Zone Cuisine’s solution took just four months—from May to August 2003.

“Getting this core production system up and running quickly and cost-effectively was instrumental in getting the business launched on time and within budget,” says Emanuel Mamzellis, Chief Executive Officer of Zone Cuisine. “Using Microsoft Business Solutions, smaller companies like ours are able to obtain big-company capabilities at small-company prices.”

### Consistent Data for Better Service

With Microsoft CRM, Zone Cuisine and its partners have one central place for customer data. All staff—at Zone Cuisine, Zone Labs, and the regional subcontract kitchens—have access to the same up-to-date customer data.

“Having a single, consistent view of our customers across the company results in greater efficiency and better customer service,” says Mamzellis. “The simple yet powerful feature of Microsoft CRM combined with the familiarity of a Microsoft interface allows our employees to centrally manage customer information with minimal training.”

Employees in the New York Zone Cuisine offices and employees in the regional kitchens can access Microsoft CRM over a Web browser or the Microsoft Outlook® messaging and collaboration client. “Once, our DSL [digital subscriber line] service was down,” says Meredith Burkus, Executive Sales Representative for Zone Cuisine. “We just went home and logged on. Our customer data is not locked in an inaccessible location.”

Adds Mamzellis, “As our business grows and develops, we have ability to change Microsoft CRM to keep pace. We can add new modules, new reports, new data fields. This system will evolve with our business.”

“Microsoft CRM has allowed us to take on more customers without growing our customer support staff. It’s helping us grow our business cost-effectively by helping our employees be more productive....”

Meredith Burkus, Executive Sales Representative, Zone Cuisine

### **Better Reports, Better Decisions**

Zone Cuisine uses Microsoft CRM to produce a wide range of daily, weekly, and monthly reports used to run the business and make strategic decisions. Daily reports tell kitchens what food to prepare and drivers where to deliver. Weekly and monthly sales reports tell marketing staff where interest is coming from, which helps the company plan new service offerings and kitchen locations.

Call tracking also tells Zone Cuisine marketers how successful its marketing efforts are. For example, if the company runs an ad in *New York* magazine, it can track how many callers found out about the company through the ad. “We can run reports showing the number of people that found out about us from Internet search engines, various magazine ads, or direct mail campaigns,” Burkus says. “Microsoft CRM is a great tool that helps us monitor and direct our marketing expenditures, which is important for a small company.”

### **Enhanced Customer Relationships**

Using Microsoft CRM, Zone Cuisine can log every conversation its staff has with customers, which helps the company capture detailed customer feedback and strengthen customer relationships. Additionally, CSRs can have Microsoft CRM automatically remind them of appropriate dates to check in with customers on various issues.

For example, a customer might call in and complain that he or she received a meat meal instead of a vegetarian meal. The CSR can note the error, apologize to the customer, and draft an e-mail to the appropriate kitchen manager (from within Microsoft CRM) informing him or her of the mistake. At the same time, the CSR can create a task that reminds him or her, the following week, to call the customer and confirm that the service was corrected—and perhaps have the kitchen send the customer a small gift.

“Our CSRs can also send e-mail messages to customers,” Burkus says. “With the detailed customer and call history in Microsoft CRM, they can personalize those messages with notes such as, ‘Did your son win his baseball game?’ In a business like ours, this kind of personal contact is very important in solidifying customer relationships and cementing loyalty. The ability to track conversations also gives us better accountability with customers, which is especially valuable when customers are speaking with different CSRs and may remember things differently from conversation to conversation.”

### **Cost-Effective Growth**

Currently, Zone Cuisine has between 15 and 20 people in its call center, depending on the time of year (January and February are the busiest). “Microsoft CRM has allowed us to take on more customers without growing our customer support staff,” Burkus says. “It’s helping us grow our business cost-effectively by helping our employees be more productive and keeping our customers happier.”

## For More Information

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For more information about Catapult Systems, Inc. products and services, call (800) 528-6248 or visit the Web site at: [www.catapultsystems.com](http://www.catapultsystems.com)

For more information about Zone Cuisine products and services, call (877) 840-3030 or visit the Web site at: [www.zonecuisine.com](http://www.zonecuisine.com)

## Microsoft Business Solutions

Microsoft Business Solutions offer integrated business applications and services that allow small and midsize organizations and divisions of large enterprises to connect employees, customers, and suppliers for improved efficiency. The financial management, customer relationship management, supply chain management, and analytics applications work with other Microsoft software, including the Microsoft Office System and the Windows operating system, to streamline processes across an entire organization. This gives businesses insight to respond rapidly, plan strategically, and execute quickly. Microsoft Business Solutions are delivered through a worldwide network of channel partners that provide specialized services and local support tailored to a company's needs.

For more information about Microsoft Business Solutions, go to: [www.microsoft.com/businesssolutions](http://www.microsoft.com/businesssolutions)

### Software and Services

- Microsoft Business Solutions
  - Microsoft CRM
- Microsoft Windows Server System
  - Microsoft Windows Server 2003, Standard Edition
  - Microsoft SQL Server 2000 Standard Edition

### Partners

- Catapult Systems

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