



## TruServ Corporation

### Company Facts

- Location: Chicago, Illinois
- Industry: Member-owned Wholesale Hardware Cooperatives
- Number of Employees: 3,000

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Sherry Fasica, Financial Manager | TruServ Corporation

### Success Highlights

#### Challenges

- Lacked flexibility to effectively manage multi-site, multi-time zone call center activity

#### Solution

- Epicor Clientele Customer Support

#### Benefits

- Upgrade roll-out completed in 24 hours
- Call escalation feature connects call log and calendar information to ensure that no call is overlooked
- Ability to link calls logged for support centers in different time zones
- .NET architecture enables real time Web connectivity for on-site and remote users

Customer service is more than a department; it's an essential strategy for growing a business. No one knows that better than TruServ Corporation, an organization formed in 1997 by the merger of Cotter & Company and ServiStar Coast to Coast. Today, the \$2.2 billion Chicago-based cooperative supports over 6,400 independent retailers worldwide working under identities like True Value, Taylor Rental Center and Home & Garden Showplace.

To ensure that those 6,400 entities get the expedient, high-quality customer service that they need and deserve, TruServ has relied on Epicor's Clientele Customer Support for more than seven years. In 2003, the world's largest member-owned wholesale hardware cooperative migrated to Clientele Customer Support .NET, which is built from the ground up on the Microsoft .NET Framework for enhanced stability and flexibility.

Total migration time on the TruServ project was about three months, due to the customizations the company required. Yet the actual rollout happened during a 24-hour period. With the help of just one Epicor consultant, the project was completed in four stages: a two-day planning session, a customizations review (in which TruServ decided to eliminate a handful of unnecessary customizations), data migration and training. With the exception of the planning session, the entire project was conducted remotely.

“We shut everything down at noon one day, and the next day when everyone came in to work, turned on their systems and logged into Clientele, it was ready to go,” says Sherry Fascia, TruServ’s financial manager and one of three project managers who handled the migration. “It really was a flawless change.”

One of the biggest benefits of the seamless transition, says Fascia, was how individual employees needed little training on the new system, and how most didn’t even notice that their systems had been upgraded when they logged on that first morning. “The minor changes we made were mostly on the customization side, and required cleaning up a few areas that were no longer in-line with our business processes,” says Fascia. “When it came right down to it, our individual users didn’t even see a difference.”

### Increased Call Center Efficiency

In addition to its extensive customization capabilities, Clientele Customer Support .NET includes built-in automation functionality for e-mail handling and call escalation. It allows rules to be set for how inbound e-mail is routed and handled, minimizing the time spent sorting e-mail, allowing support agents to focus on customers and issue resolution. Clientele Customer Support .NET also includes a call escalation facility, which defines business rules and processes for managing unattended calls. The call escalation feature connects the call log and calendar information with definable actions for escalation to help ensure that no call is ever overlooked.

For TruServ, which operates call centers in two different time zones, those features were essential. Prior to the migration, each center’s system logged calls according to their respective local times. If a call came into the company’s Chicago call center and logged in at 10:00 a.m., then transferred to a customer service representative in Butler, Pa., five minutes later, the latter often assumed that the call had been sitting in queue for over an hour without attention.

Customer Support .NET accelerated the rate at which TruServ’s Chicago and Butler call centers share information and reports. In

the past, Fascia says it often took up to 30 minutes to print a report shared between the two because all of the information had to be brought over from one call center, filtered into the software and then printed out. “It was an inefficient way to work,” says Fascia. “Now with the real-time Web connectivity enabled by Clientele’s .NET architecture, Butler, Chicago and anyone else who dials in from the field can print reports and information quickly.”

### Customization Counts

During TruServ’s migration, a number of customizations were brought over from the company’s previous system. TruServ, which has complicated value lists, also needed certain items to be categorized and put into sub-categories. In addition, the company had roughly one gigabyte of data to transfer to its new system, including 200,000 records in the call table and over 300,000 records in the event table.

Even with those challenges to deal with, TruServ’s Clientele system was down for a mere three hours during prime time and an additional eight hours during evening support – a number that could have been whittled down even more had the company not chosen to shift to new servers in its Chicago facility at the same time.

As TruServ’s senior programmer and analyst, Mike Swallow says the entire migration process was managed and orchestrated very well. He points to the fact that Epicor first created a “test” environment in which TruServ was able to give the solution a trial run – without disrupting its current system in any manner – as a real plus. During the test migration Epicor consultants made a copy of TruServ’s data and migrated it over, allowing them to test the system and familiarize themselves with everything. This also provided an opportunity to fix any issues before going live.

Early on, Fascia says TruServ realized that the migration would take several months, adding that it undertook the project based on how easy and quick future upgrades would be, due to the solution’s

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highly flexible .NET architecture and the use of the Microsoft Visual Studio .NET IDE as its customization environment. Making the migration particularly attractive, she adds, is Epicor’s Clientele Self-Service Portal, which TruServ plans to utilize in the near future.

## About Epicor

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