

GROWERTALKS

Features

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Sales Bridge Building

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The green industry is standing on the edge of the Grand Canyon when it comes to the tech that runs our businesses. On one side, we stand with our legacy software programs that might or might not be cloud based (online). We have our spreadsheets and our fax machines. We're hand entering our customers' orders and we're calling them to update availability. We're standing on the south rim sending the same availability to everyone, regardless of what they've historically bought. We're exporting .csv files from one program and manually uploading them to another program.



Build a bridge to somewhere

What's on the other side of the canyon? The ability to run our businesses and grow in an efficient and sustainable way—a financially sustainable way, a “we can hire enough people to run this business” sustainable way, a “we can get the info to our customers the way they want and need it” sustainable way, a “sure, we can connect with your system, no problem” kind of way.

Obviously, there are differences in business sizes and methods of operation. Smaller grower-retailers have different tech stacks than large wholesale growers. If you want to grow beyond your current operations, you'll need a bridge of some kind ... unless you want to keep scrambling up and down the cliff.

Do you need a bridge or do you need an entirely new highway system? We'll get to that ...

Ignore sunk costs

Before we go further, let's chat about money. With any big tech jump it's easy to get bogged down in sunk costs. (Sunk costs are all of the non-recoupable time and money that you've already invested in a project or system that isn't working.)

“But I've bought all this hiking equipment. Why would I invest in a bridge?” Let me tell you: I have BEEN. THERE. (Call me and I'll tell you the story so you don't have to learn the hard way.)

Here's something to help you get past the sunk cost fallacy: chances are good that you learned something while struggling in that faulty system, so take note of what didn't work when you're building the new one. That's valuable

info that you might not have learned otherwise and it'll help you build a better system next time.

Plan your route

Knowing you want to travel from spreadsheets and faxes to efficient online availability management and draft order capability isn't enough. You've gotta make a map. In business, that's called a Function Flow Diagram, or an FFD. You can draw a simple one on a piece of 8.5 x 11 paper or you can use an online program like Figma or Draw.io. Convene key staff that are involved in the process of planning, growing, selling and shipping the plants.

First, draw the way things happen now. Once you draw the diagram you can jot notes about who does what, who needs access to what and mark pain points in the process. Next, draw the way you want things to happen in the future. Start at the beginning and build your dream system on paper. (Ignore sunk costs!) Then, run some numbers and refine your vision.

Wendy Brister from Cavano's Perennials gives us the straight talk: "It can be expensive and a heavy lift to get your inventory online. You have to be clear that it is worth the time and money."

I agree. This isn't a full court press to get you to go fully online. This article is to help you go through that process more easily, efficiently and cost effectively.

Why bother to make your diagrams? You thought you needed a new website and now you have to draw MAPS? Yes. If you don't have a map, you're going to get lost and potentially take a costly detour. Just like a car, a website or an inventory system is a tool. The FFD is the map that tells you how to operate your business like a map shows you where to drive the car. These two diagrams and corresponding notes are vital reference points for making software purchasing decisions. Without processes (maps), your tools won't work. A hammer is just a hammer. It can't pound a nail by itself.

Identify your crew

Who'll help you build the bridge and who'll help you drive across it? Start by talking with the personnel that operate your current tech, both staff and contractors. If you're looking to offer online availability, you **MUST** involve your web developer or web manager in the conversation unless you plan to replace them. They absolutely have insight into how your web presence currently works and will be able to help you with your line of questioning as you evaluate new systems and software. **DO NOT** make a big choice that involves your website without talking to the person that manages it. At least give them a heads up. I'd also advocate for roping in your marketing and sales team, too. These systems don't exist in a vacuum and, believe it or not, the way your production software works does impact their ability to efficiently sell what you're growing.

In addition to your existing staff and contractors, you may consider securing additional help to vet your choices. System architects, ERP architects and even your peers that have successfully (the success part is important) gone through tech jumps can be helpful to you. It's like hiring an architect to draw plans or engaging a vet to treat your pet. When you're making a \$50,000 to \$500,000 to \$5 million decision, you need expert help from someone that doesn't have financial motivation to sell you something specific. Expect to pay between \$5,000 to \$25,000 for this help, depending on the complexity of your project. Salespeople should want you to have the right system for you, but they are **ALSO** reliant on their sales.

Survey the land

Do you need to connect two systems that work well independently or do you need to replace both of them and then some?

You've identified how your entire system of software and processes needs to work in order for your business to grow, and for today's discussion, in order to offer online availability. Before you go shopping for new software, make

sure you're already using all of the features you're already paying for. Maybe your current system has capabilities you don't know about or they've added new features. Now that you're looking to grow in a different direction, investigate how your existing software can connect to others. If it can't—or it can't without expensive customization—you need to replace it. If it can connect, you have options.

I talked with William Klaassen of the Aster Software Group about ways to connect inventory, production or full-on ERP systems to a website to achieve the purpose that triggered this article: getting reasonably accurate availability online so that customers can “shop it” or place a draft order or a purchase order.

He explained it neatly in terms of easiest to most involved:

Easiest choice: A built-in app that natively connects two pieces of software—an inventory system and a website. These type of apps and connections are available within the two software systems.

Straightforward second choice: Using middleware software to connect the two. Middleware is outside the two main systems, so it's a third party connector, but one that's already configured to handle the back-and-forth communication without you needing to code. Some examples are Zapier, Boomi, MuleSoft and more.

Custom choice: Someone builds the connective components from scratch using a script to communicate between the two systems. This is the most expensive and technically complicated choice. If this is the way you go, you need to make sure you have experienced help to work through it. Whenever you custom connect or custom build anything, if one side of the system updates, it can break the customizations on the other side. It might be tempting to keep what you have and double down on customizations, but in the long run, you might be better off with things that work “out of the box.” If you do have someone create a custom connection between one of your systems and your website, it's best to keep website customization (writing entirely new code for the website) to a minimum and configure existing website functionality to meet your needs.

Customization = expensive to implement, requires long-term monitoring by professionals and has a high ongoing potential to break.

Pack your toolbox and rent an excavator

Once you know whether your existing systems can connect to the new system (your production planning and inventory can connect to your website) you can start building the tech connection and organizing your new processes.

If you've determined you need to scratch the programs you have and go in a different direction, you can start vetting new software options. Resist the urge to simply use what your buddies are using (though it's okay, and even useful, to talk to others). Every business is different. Use your documentation, your expert help and the documentation from the new systems to help you decide what to select. Ask the salespeople to speak with existing customers to get a “boots-on-the-ground” perspective.

Build your bridge and update your map!

You know how things work currently. You know how you want them to work. You've written it down. You've convened your team to discuss and trial new systems. You have your expert help and you've tested and vetted new systems. It's time to build. (That's its own article!) Once everything is configured and tested, update your maps (your processes) and help your staff and customers across the bridge. A whole new world awaits you on the other side.

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