

Improving Team Communication in C-Store Operations with a Shared Collaboration Platform

This client offers retail, convenience, and food and beverage goods across the U.S. and Canada. These service offerings originally operated as independent lines of business, which the client has been working to integrate through various internal initiatives. A key focus of these efforts has been identifying opportunities for commercial and operations teams to work together across the organization, coordinating with and servicing all lines of business. Clarkston was brought in to facilitate the execution of these internal initiatives.

A key issue that Clarkston observed during this process was the lack of singular sources of information between centralized planning teams and distributed field operators. Without a clear and shared source of information, local teams had to rely on cumbersome amounts of emails and multiple planning calendars to access information, making it difficult to plan and execute.

Clarkston understood that the client needed a centralized calendar that could directly connect all corporate planning teams with field operators. Clarkston worked with client leadership to select Airtable, a cloud-based data management and visualization tool, as the best platform for the job.

Airtable was selected for its ability to seamlessly consolidate information from independent sources and transform data into highly customizable and user-friendly visualizations. Clarkston designed and developed Airtable processes for the client's commercial and operations teams, successfully transitioning from their previous spreadsheet tools into Airtable. Clarkston then used this centralized data as an input to create a calendar for field operators, providing a directly accessible single source of truth.

Retail Case Study

PROJECT OVERVIEW

INDUSTRY:



Retail

PRODUCT AND SERVICES:



Airport, Travel Convenience,
Food & Beverage, Retail

PRIMARY OBJECTIVES:

- Create a calendar that consolidates commercial and operations plans into a single platform
- Facilitate the ability for field operators to execute and plan – well in advance – their local activities from a single, shared source of truth
- Reduce the reliance on cumbersome and sporadic email-based communications through a calendar that dynamically reflects changes in commercial and operations teams' plans
- Align planning teams' processes leveraging Airtable as a central system to manage their planning data
- Introduce field operators to the Airtable calendar and drive the adoption of the calendar as a tool

RESOLUTION:

- Gathered user requirements for the calendar based on current ways of working for both planning teams and field operators
- Selected Airtable as a platform after vetting its capabilities and exploring the tool in an experimental capacity
- Created a project delivery framework for the regular reporting of progress to client leadership
- Worked concurrently with 10 planning teams to shift their current ways of working into Airtable, providing direct development of Airtable infrastructure and hands-on training for team members
- Drove the design of planning team Airtable data and ensured data uploads were done on time
- Designed and built the calendar that would serve field operators as the end-user interface where they could access planning team information
- Led a pilot period with key end users to improve calendar features prior to go-live
- Led calendar launch and post-launch forums to assist end-user adoption

KEY BENEFITS:

- Created a centralized calendar for the client's commercial and operations events, eliminating the reliance on multiple sources of information
- Improved efficiency of coordination and information sharing between planning teams and field operators by reducing the need for email communication
- Established a platform that could be replicated in other lines of the client's business to drive further integration and better ways of working together



KPIs

- 10 planning departments across commercial and operations teams consolidated into a single shared calendar
- 100+ field operators (end users) onboarded to begin using the calendar
- Directly connected the information from a single planning office to 50+ locations across the U.S. and Canada

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