GOLDEN SNACKS

Telemarketing Transformation

Leveraging Microsoft Power Platform for Enhanced Operational Efficiency

Power Apps, Power Automate, Dataverse, Fabric, & Power BI

XCONTENT®

About Golden Snacks

Golden Snacks is a dynamic player in the food industry, renowned for delivering high-quality, ready-to-eat snacks that cater to a wide variety of tastes. Their flagship product, the Golden Pockets, offers a modern twist on the classic samosa—using traditional vetkoek dough instead of the conventional filo pastry. Generously sized and bursting with flavour, Golden Pockets are not only super tasty but also widely accessible, making them the perfect choice for anyone seeking a satisfying and convenient meal on the go.

The Pain Points

Initially, Golden Snacks managed their telemarketing call logs using Excel spreadsheets — a decentralized approach that led to a host of inefficiencies. Without a centralized system, it was challenging to track which telemarketers were making calls, whether customers were being reached, and if call targets were met consistently. This lack of visibility hindered accountability and made it difficult to generate actionable reports.

As requirements evolved, additional challenges emerged:

Limited Data Access

Telemarketers lacked real-time access to key store details (e.g., last call date, contact information, and owner data) essential for meaningful customer interactions.

Cumbersome Order Process

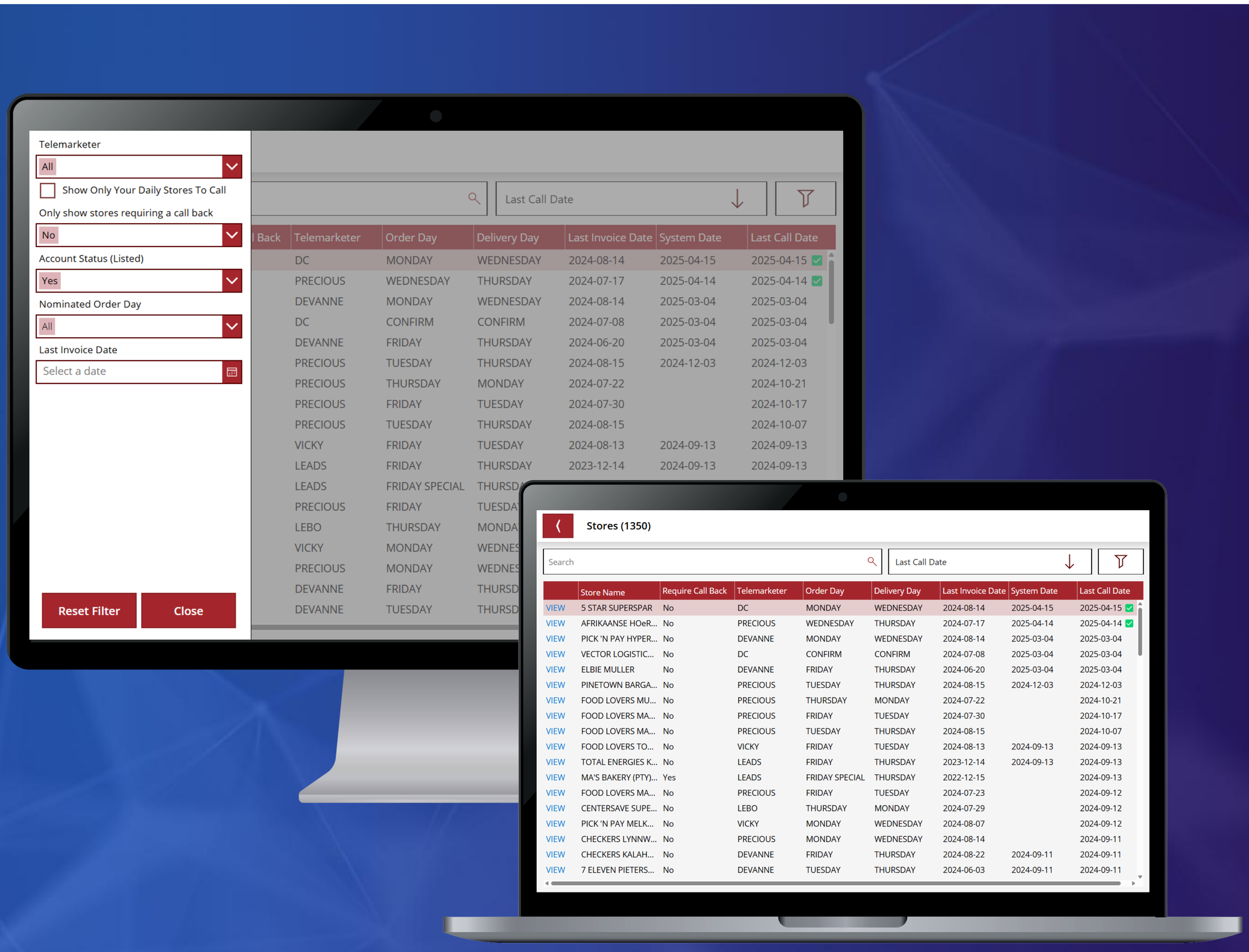
Orders were placed outside the call logging system, forcing telemarketers to switch between applications like Omni, resulting in delays.

Fragmented Processes

What began as a simple call log soon required integrated order placement and invoice tracking, complicating the workflow further.

Our Approach & the App

We transformed the outdated Excel-based process into a robust, end-to-end telemarketing solution that centralizes and streamlines operations. Leveraging the Power Platform, our solution integrates data from multiple sources into one intuitive interface. Here's how we did it:



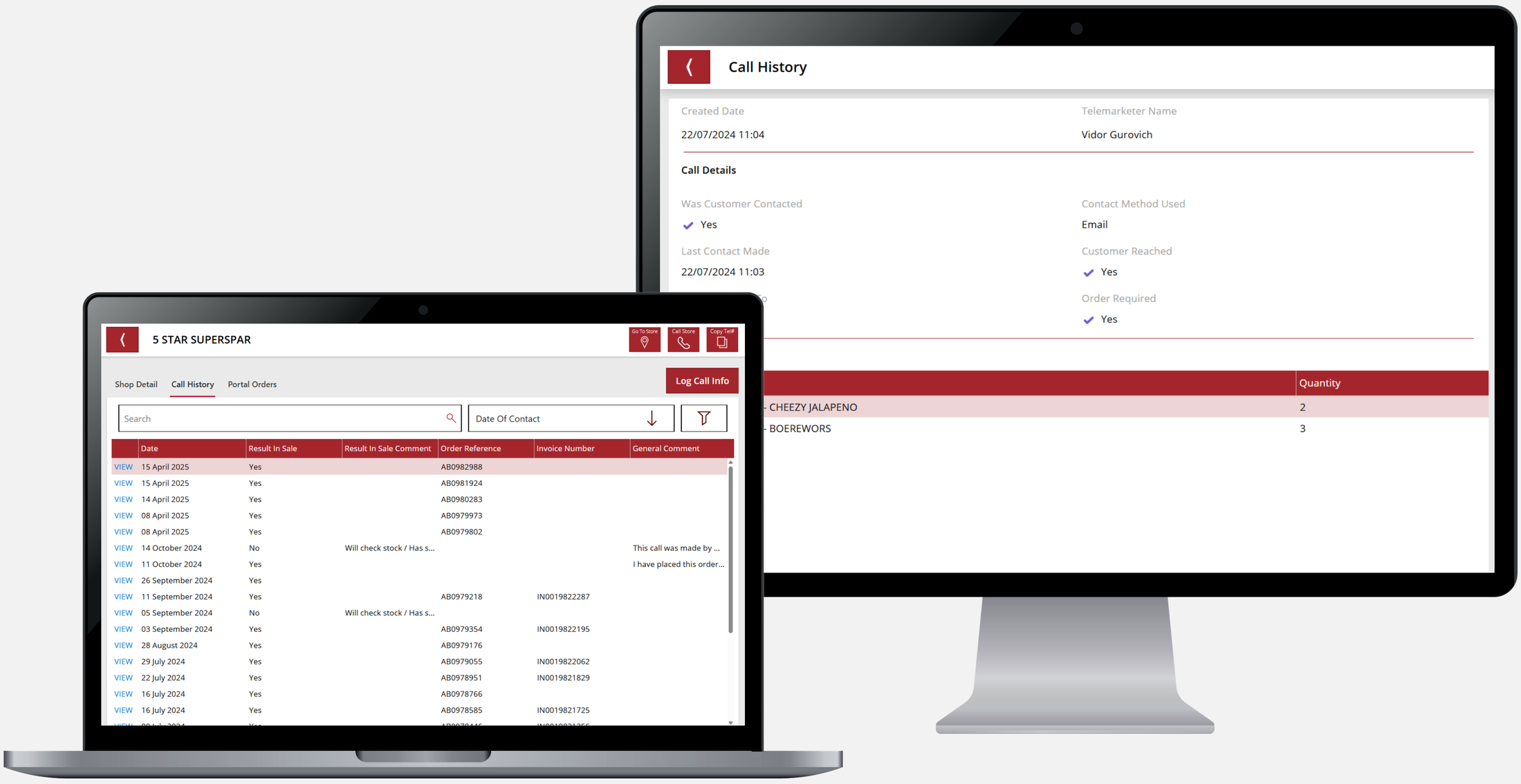
Unified Store View & Dynamic Filtering

Telemarketers now have a comprehensive view of all stores from the ERP system with advanced filtering options by category, store name, assigned telemarketer, and last invoiced date. This empowers them to:

Target Their Own Stores
Quickly filter to see the stores assigned to them.

Plan Daily Calls
Identify which stores need calling on any given day.

Visual Confirmation
A green tick indicator confirms when a store has been called for the week.

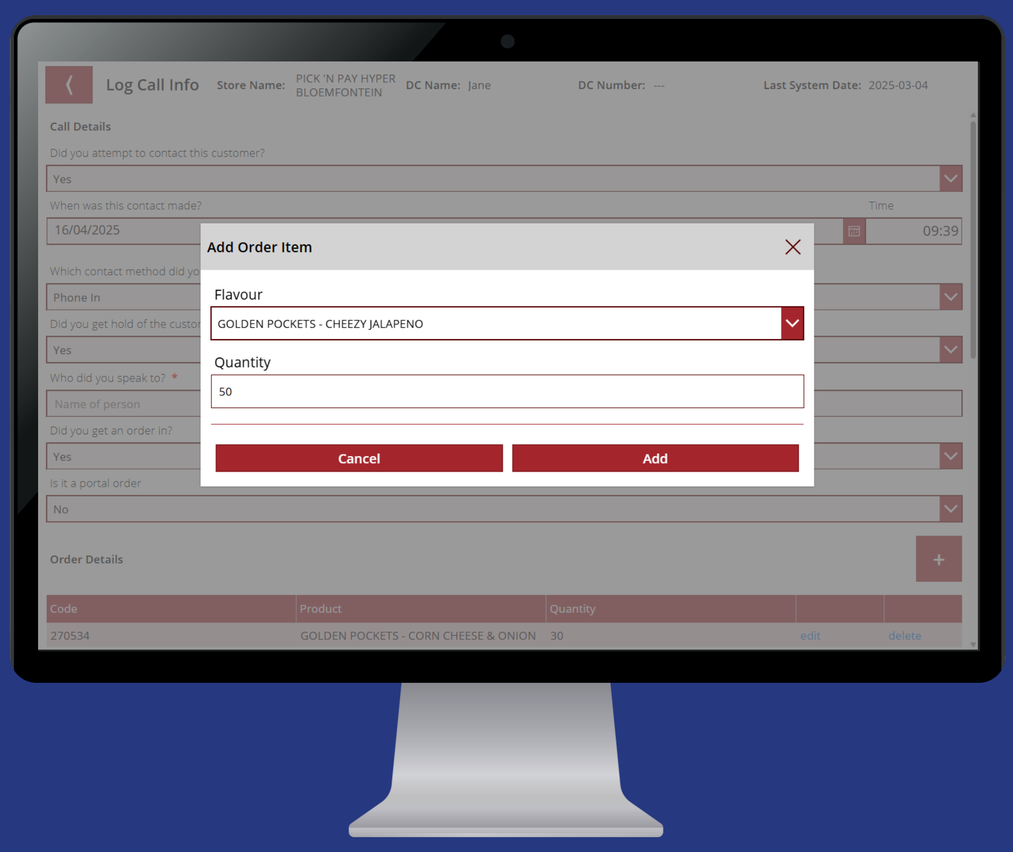


Comprehensive Store Profiles & Call Logs

Each store profile displays detailed ERP data and a complete history of interactions:

Call Logs
Clickable entries allow telemarketers to dive into past interactions.

Order History
Integrated within the call logs, enabling a quick review of previous orders.



Integrated Order Placement & Processing

The app has evolved to streamline the entire order process:

Real-Time Order Creation
Telemarketers can log a call and directly place orders via a REST API call to the ERP system.

Automated Order Processing
A daily Power Automate flow fetches invoice numbers and matches them with order references, reducing manual errors and ensuring orders are processed accurately.

Seamless Data Integration & Analytics

The solution also integrates additional data sources:

Portal Orders Integration

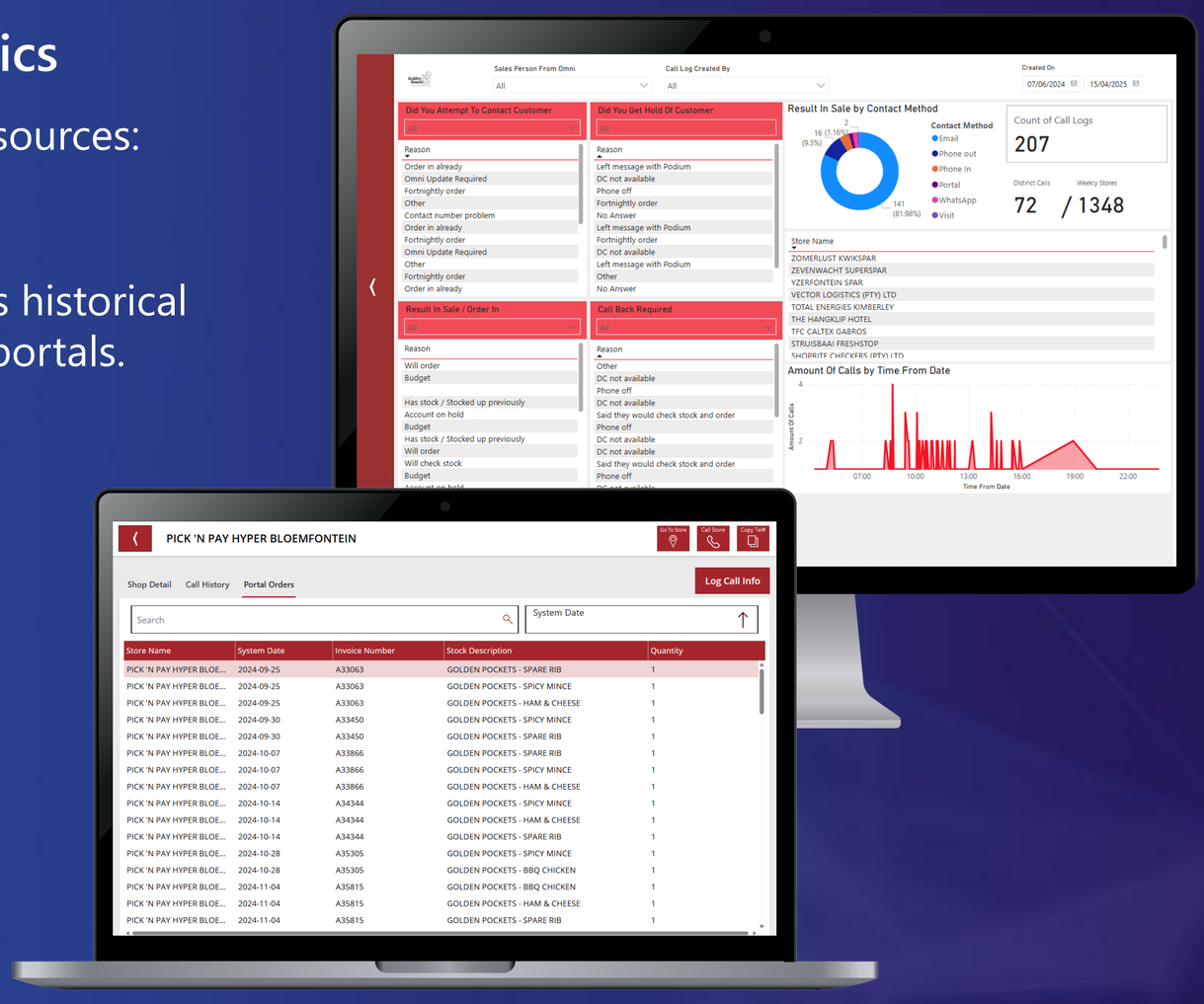
A dedicated “Portal Orders” tab pulls historical data from Pick n Pay and Checkers’ portals.

ERP Data Sync

Real-time store data from Omni is displayed directly in the app.

Advanced Reporting

Data transformations in Microsoft Fabric feed into embedded Power BI reports, delivering insights on order trends, telemarketer performance, and store updates.



Leveraging Microsoft Power Platform

To transform Golden Snacks' outdated Excel-based process, we leveraged the Microsoft Power Platform. By integrating Power Apps, Power Automate, Dataverse, Fabric, and Power BI, we created an end-to-end solution that centralizes call logging, provides real-time store data access, and automates order placement.

Microsoft Power Apps

Microsoft Power Apps serves as the user-friendly frontend interface, centralizing operations and simplifying tasks for employees, thereby reducing training time and errors.

Microsoft Power Automate

Microsoft Power Automate synchronizes the ERP database with Dataverse and automated the posting of sales data back to the ERP system, ensuring real-time updates, reducing manual data entry errors, and creating sales orders directly from the app.

Microsoft Fabric

Microsoft Fabric ingests data from Dataverse, PnP, and Checkers portals, transforming and storing it in a gold table for reliable reporting, while also providing centralized storage and housing separate dev and prod workspaces to facilitate efficient development and deployment of Power BI changes.

Microsoft Power BI

Microsoft Power BI pulls data from the Fabric Lakehouse and displays it in comprehensive dashboards, transforming raw data into actionable insights and enhancing decision-making and transparency.

Impact & Outcomes

The Golden Snacks telemarketing app has significantly transformed the way telemarketing operations are managed:

Improved Overall Efficiency

Telemarketers now have a centralized, real-time view of all store data. This enables them to manage their calls more effectively and reduces the time spent switching between systems.

Enhanced Order Placement

The direct order placement feature has streamlined the process, enabling orders to be placed during the call without switching platforms. This integration has simplified workflows and enhanced operational efficiency.

Actionable Analytics

The embedded Power BI reports are beginning to deliver valuable insights into order and call trends. Although users are still getting accustomed to the full potential of these analytics, the data is already proving beneficial for strategic decision-making.

Overall, the solution has streamlined the telemarketing process and enhanced order accuracy while providing a solid foundation for data-driven insights. Ongoing optimizations will further enhance its impact.

Future Directions & Next Steps

One of our key milestones was to implement a dedicated sales rep section. Evolving from the telemarketing app, this future enhancement will be a separate app optimized for tablets and smartphones. The sales rep app will empower field representatives to:

View Store Data

Access detailed profiles, including ERP information and the last 5 weeks of order history.

Review Past Visits

Easily review all previous store visits along with the captured data.

Log Visits & Odometer Readings

Record odometer readings for tax purposes and capture data on store displays, cooking standards, flavour indicators, and point-of-sale materials.

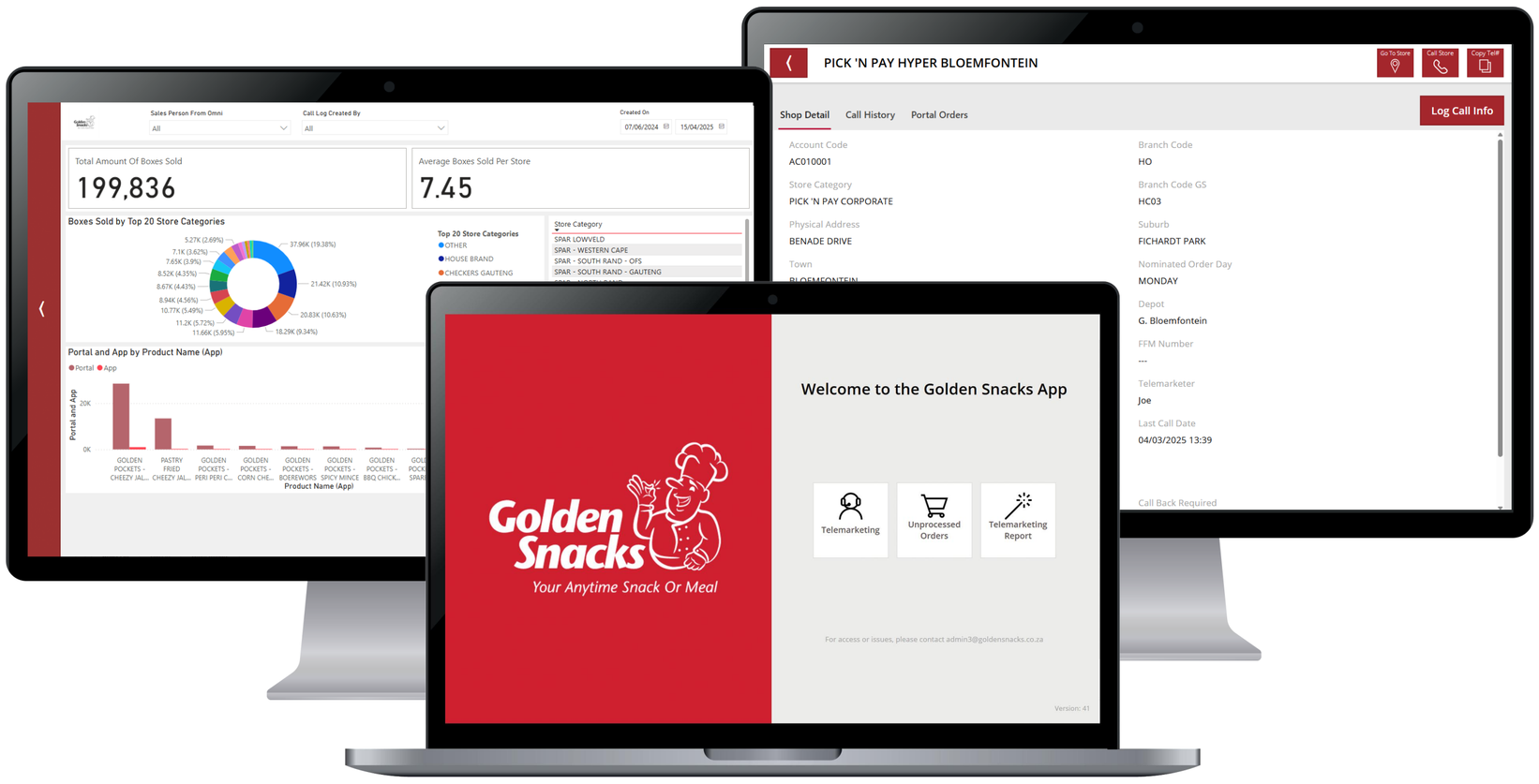
Enhanced Analytics

Utilize a dedicated Power BI report to track trends in store quality improvements and monitor sales rep performance.

Conclusion

Recap

The Golden Snacks telemarketing app transformed an outdated, Excel-based process into an integrated, end-to-end solution. Leveraging the Power Platform — including Power Apps, Power Automate, Dataverse, Fabric, and Power BI — the app centralizes call logging, delivers real-time access to essential store data, and streamlines order placement through automated processes. This transformation has significantly improved operational efficiency and data accuracy, empowering Golden Snacks to better engage with customers and optimize their telemarketing efforts.



Final Impact

The solution not only reduces manual errors and processing delays but also provides actionable insights through comprehensive analytics. As Golden Snacks continues to evolve, this integrated platform lays the groundwork for future innovations — ensuring that their operations remain agile, data-driven, and ahead of the competition.

Ready to Transform Your Business?

Discover how our Power Platform expertise can streamline your operations, boost efficiency, and deliver actionable insights. Contact us today to learn how we can help solve your challenges and drive your business forward.

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