

# PICNIC TIME

MOORPARK, CA | PICNICTIME.COM

## The Company

Picnic Time Family of Brands is a Moorpark, CA-based distributor of supplies for picnics, patio dinner parties, barbecues, tailgates, and all sorts of outdoor entertaining.

Founders Gustavo Cosaro and Mario Tagliati, originally from Italy, started a wine and cheese shop that grew rapidly in popularity. Customers would tell them, “You have everything perfect for a picnic except the picnic basket.” So they started selling picnic baskets, too. Over the course of 35 years, Picnic Time has grown from a small food store to a company that processes between 120,000 and 150,000 orders a year and ships worldwide.

## The Challenge

According to Paul Cosaro, managing partner and “Captain Picnic” at Picnic Time, the company’s main focus is complete customer satisfaction. To that end, it needed a reliable, flexible system that could be customized according to its specific processes and scale to meet its fast-growing demands.

Picnic Time needed to get its items out the door quickly while maintaining full confidence in its order accuracy and quality. Before making the switch to SalesPad, the company was frustrated by its software’s inability to adapt to its evolving business needs.

“Customer service is the pinnacle for us,” Cosaro explained. “Our customers are typically retailers, who,



in turn, promise to provide excellent customer service to their consumers, the people who are buying our products to own and to use. So, our philosophy is that if we can’t provide them with excellent customer service, how can they then service their customers in the way that they want to?”

## The Solution

CAVALLO SALESPAD. When it came to finding a distribution management software solution that allowed Picnic Time to improve its customer service, provide excellent insight into company performance, streamline order processing, and minimize the number of clicks overall, SalesPad was a clear winner. In addition, the on-premises solution offered customization options that don’t come with every ERP

software solution.

When considering the switch to SalesPad from Picnic Time's previous software system, Paul Cosaro said, "The main things that stood out [concerning SalesPad] were the workflows that are so customizable, plus the ability to incorporate additional products, such as DataCollection, Cavallo Mobile, and FedEx Ship and UPS Worldship Connector. It wasn't just a front-end hat that sits on Dynamics GP, it was so much more than that." says Cosaro. "We love it."

He called out the ability for customer service representatives to easily access data pertinent to any customer-related issues they were dealing with. The speed with which they are able to find the information they're after results in happy customers, happy reps, and a positive reflection on the company.

### EDI made easy

Cavallo EDI in particular met a lot of Picnic Time's order processing-related demands. Electronic Data Interchange (EDI) is a standardized communication format for crucial business document information traveling from computer to computer. EDI allows the buyer's order processing system to talk directly to the supplier's system, which speeds up the entire process and eliminates the potential for human error.

Picnic Time made the switch to Cavallo EDI and hasn't looked back since. According to Picnic Time's EDI Coordinator, Bonnie Tallada, the number of clicks it took to successfully process an order went from 10 to just one.

"It's a fully automated system," Tallada said. "Orders will not make it out to the shipping department if [the order] comes from an incorrect ship-to address, so it prevents us from having issues from the beginning."

"EDI is daunting," Cosaro added, "and by working



Watch our interview with Picnic Time at [cavallo.com/case-studies/picnic-time-family-brands](https://cavallo.com/case-studies/picnic-time-family-brands)

with Cavallo and SPS, we've been able to make it manageable and user friendly."

Utilizing Cavallo EDI has allowed Picnic Time to grow online sales by enhancing its ability to sell to big-box stores such as Wayfair, Target, and many other online retailers. Expanding these sales channels makes it easier for consumers to find Picnic Time products, increasing the company's exposure and sales.

### Seamless and accurate order processing

Implementing an EDI software can pack a big punch when it comes to bringing a company to the next level. Picnic Time took full advantage of this opportunity by working with SalesPad to streamline its order-processing services.

EDI greatly reduces the potential for costly mistakes. By automating many aspects of the workflow, the entire process moves faster, maintains consistency, and frees up employees' time to tend to other aspects of their business.

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Paul Cosaro, Managing Partner



“Cavallo EDI enabled our customer service team to process orders effectively and more efficiently,” Tallada said. “We can continuously pull orders without worrying about errors, even over the weekend. It’s a big plus for Picnic Time, because we’re committed to providing good customer service. Our previous system required a lot more time on our part and a lot more clicks. Cavallo EDI is so seamless, you forget it’s even there.”

Tallada noted that she’s yet to run across any issues with onboarding trading partners, such as the big-box retailers, from Picnic Time’s previous EDI system into SalesPad, and that the whole process of testing and mapping has been surprisingly smooth. Picnic Time is looking into fully transferring all of its manual orders into the EDI processing system, and that journey has been going well.

“My colleagues and I agree; Cavallo EDI is two thumbs up,” Tallada said.

### **Company level insight through instant data visibility**

Beyond all the benefits of utilizing EDI, Cosaro said he appreciates the managerial tools available to him through SalesPad.

“From a management perspective, I use SalesPad for running reports. ... It’s a good tool for minute details, like A/R issues or A/P issues, order details all the way up to high level dashboards and the quick reports

that we use. It’s quick. It’s there at my fingertips, and I couldn’t imagine doing business without it.

“I use SalesPad on a daily basis to keep a pulse on the overall health of the company,” Cosaro added. “It’s much easier and quicker than going to our controller or the accounting team and having them run all these obscure reports in GP.”

The ability to quickly gain insight into company performance is key to successful management practices. The simple, instant access to inventory, customer, and sales data provided by SalesPad is very important to Cosaro, and the ability to easily export that data gives him a big advantage when making administrative decisions. The fact that his customer service reps can also access the data they need eliminates a lot of back-and-forth within the company.

“The ability to have all that data at our fingertips is priceless,” Cosaro concluded. “It saves me time, it saves our customer service reps time, and it really guides us in the right direction.”

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Bonnie Tallada, EDI Coordinator

