



# Selected Projects



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## 1. Executive Strategy



**Problem** A retailer planning a 2 billion dollar spinoff needed a complete technology migration plan for the new entity, with no risk of downtime in transition.

**Solution** Mapped out marketing technology plan for technology separation, including wind-down of content and servers, duplication of assets, migration of systems to new physical location, and start-up in new environment.

**Result** Delivered complete day-by-day transition plan for multi-billion dollar company. This included a detailed plan for separating out over 100,000 assets and bringing systems online for the new entity.

## 2. Executive Strategy



**Problem** This 800+ store national retailer wanted an enterprise system to enable greater sharing of financial and product information, and to bridge the gap between existing departmental 'silos'. Executive management needed access to this information so as to provide proper oversight, improve P&L analysis, document use of vendor funds.

**Solution** Designed and implemented an Oracle-based central store of data to allow sharing of information across departments. Installed solution and conducted training for all users. Migrated item, copy, and price information to online system.

**Result** Successfully managed over 2 million store-level item price points. Bridged the departmental 'silos' of Merchandising, Marketing, and Finance with a single workflow system. Successfully decreased out-of-stocks on promotional items and established single system of record for promotions and ad events.

## 3. Executive Strategy



**Problem** This 20+ billion dollar client had several problems relating to workflow management in marketing and merchandising. They wanted to determine the best course of action to simplify and automate many cumbersome and expensive processes.

**Solution** Implemented a fully integrated system and quickly determined the ROI for the client. This strategy consisted of a timeline for technology implementation, benchmarks and best practices with which to measure progress.

**Result** Successfully implemented a highly developed and structured plan to enable the exchange of information between advertising and production and automation of this process. The ROI was in excess of \$10 million.

## 4. Executive Strategy

**Problem** This specialty manufacturer needed to have a better handle on internal marketing costs, improve production efficiency, and reuse existing content to develop new products with greater margins.

**Solution** Engaged with President, CFO and VP of Marketing for P&L review. Followed up with detailed ROI analysis of product development, marketing, and production.

**Result** Successfully engaged in strategic planning presentation to set corporate direction. Upon approval, engaged in live project which had zero project overruns, and delivered cost reduction of 20%.

## 5. Executive Strategy

**Problem** This provider of educational material, including technology products and textbooks, needed to control costs and improve efficiency. Executive management wanted new approach to cut costs without losing efficiency.

**Solution** Engaged with President, CFO to review company P&L. Engaged with project Directors to prepare detailed ROI analysis and prepare proposal for improving margins.

**Result** 'Near-sourced' project, took over key staff, and successfully engaged a fixed-price contract. Delivered 18.4% savings with EBITDA impact.

## 6. Executive Strategy

**Problem** This national provider of content, testing, and training services with presence in over 30 states needed new strategy to repurpose and effectively deliver its content to new markets. To maintain competitive advantage, this new solution had to be engineered within 6 months.

**Solution** Engaged with President, COO and several Executive Directors for company-level P&L review. Followed up with detailed program plans for new product introduction.

**Result** Successfully solved the technology problem to allow solution delivery within 6 months. The solution 'refreshes' the client's existing assets and distributes them over a new service delivery environment.

## 7. Sales Analysis



**Problem** This regional chain of supercenters in the Northeast wanted a scientific, analysis-driven way to drive Merchandising's item selections and promotion planning, and link this to Advertising and co-op fund management.

**Solution** Measured ad lift by item, volume, and profit; estimated square-inch returns; created an analytics-based advertising process.

**Result** Successfully delivered analytics-driven ad item selection for top 1,000 items weekly. Promotion fund tracking for over \$20 million vendor funds, and automated versioning of circulars for 12 markets.

## 8. Catalog Production



**Problem** A rapidly expanding company needed help to scale the production of coupon and offer books from 20 cities to 200 cities within a two year window.

**Solution** Established a central store of information in Colorado and fully automated publishing of coupon and offer books.

**Result** Successfully increased staff productivity ten-fold in two years so they went from producing 20 books to 200 books without increasing head count. Delivered supporting systems for receiving and entering all offer book deals from field sales teams. Centralized all content and production, and automated production of custom books for over 200 cities in the United States. 100% ROI achieved within four months.

## 9. Enterprise Systems



**Problem** This 10+ billion dollar client needed a system to streamline version management and last minute pricing. They needed to revise the department's workflow procedures, streamline the versioning process, cut out as many manual steps as possible, and reduce time to print.

**Solution** Installed a database linked to the client's mainframe system for Event Information. Company was able to open two new divisions and incorporate a billion-dollar acquisition with same Marketing headcount.

**Result** Advertising successfully delivers prices to Production the day ads are released to the printer for print runs of up to 20 million copies. Production cycle shortened by one month. Automated versioning has virtually eliminated pricing and product information errors. 100% ROI was achieved within six months of operation.

## 10. Ad Versions & Last Minute Pricing



**Problem** This \$2.2 billion retailer needed a workflow solution to link Merchandising with Advertising, help them manage versioning and help them reach their goal of delivering last minute pricing to Advertising.

**Solution** Implemented software enabling Merchandising to deliver ad pricing directly to the Advertising Department, eliminating the need for rekeying data.

**Result** The client successfully produces its 2+ million ad runs of multi-zone circulars with greater speed and confidence now than ever before. Versioning for all ads and markets occurs electronically and automatically, without the time consuming and error prone practices of manual versioning.

## 11. Image Management



**Problem** This national retailer needed to automate image management and archiving, linking its photography studios, remote shoots, and photo retouching with a central archive.

**Solution** Established archiving standards, naming conventions for managing over 150,000 images. Coordinated transition with MIS, multiple vendors, and internal departments.

**Result** Successfully installed web-based system which provided immediate access to images across the enterprise.

## 12. Database Management



**Problem** This billion dollar chain of superstores needed to manage the extreme demands of hundreds of markets and store fronts where customers wanted the best value offer possible each week.

**Solution** Implemented a database solution for Ad Management, promotion pricing and versioning. This automated versioning helped them reach the goal of 'extreme last minute pricing' on Saturday for insertion in Sunday ROP ads.

**Result** This "Last Minute Pricing" solution delivers prices at the very last minute possible before the ad is sent for printing. Our client took this to the extreme, practicing one of the most advanced methods. They versioned ROP ads for over 500 markets and delivered to newspapers on Saturday for insertion in the Sunday newspaper.

### 13. Ad Versions & Last Minute Pricing

**Problem** This \$700 million client needed a workflow solution to help manage versioning and to reach the goal of last minute pricing of ads.

**Solution** Software was designed and implemented for product information management, promotion pricing and versioning.

**Result** Client can rapidly and accurately produce versioned circulars for its markets, with a 5+ million weekly print run. Completely eliminated time consuming and error prone practices of manual versioning.

### 14. Marketing

**Problem** This national retailer wanted to eliminate the errors in information at the customer level, and ensure price maintenance.

**Solution** Established systematic ways to catch promotion mismatches between marketing, product information, and pricing for 22 states simultaneously.

**Result** Successfully eliminated product, promotion, and pricing errors and ensured correct product information at all customer touchpoints.

### 15. Linking Merchandising & Advertising

**Problem** This billion dollar supermarket chain needed a workflow solution to link Merchandising with Advertising. The process begins in Merchandising, with product selection and pricing decisions being made by buyers, then being relayed to Advertising for price versioning and completion of the printed circular pages.

**Solution** Two systems were designed and implemented: one for Merchandising, for product information management and promotion pricing; and another one for Advertising, for last minute pricing and versioning.

**Result** Successfully linked ad and promo plans between Merchandising and Advertising. Enabled the client to produce its versioned circulars with greater speed and confidence than ever before. Price merging for all ads, in all relevant markets occurs electronically and automatically.

## 16. Sales Analysis



**Problem** This \$300 million regional chain of 40 supercenters had ineffective ad performance. They needed to improve lagging ad sales and store traffic, and stop out-of-stocks from occurring on ad items. In addition, vendor funds were not being efficiently managed, leading to millions of dollars in funds being lost each year.

**Solution** Worked in a team across merchandising, advertising, and vendor fund management groups. Measured ad lift by item, volume, and profit. Estimated square-inch returns. Created an analytics-based process for ad item selection.

**Findings**

- Identified 'cherry-picking' habits by shoppers
- Recommended ad strategy to capitalize on this and draw shoppers to store
- Recommended optimal ad placement strategy
- Prioritized ad space allocation for merchandise categories
- Installed system to manage vendor funds

**Result** Successfully delivered analytics-driven ad item selection for top items. Increased vendor fund use by over 10% for over \$20 million in vendor funds. Automated image management, ad pricing, and page production of weekly ad flyers for 12 markets.

## 17. Sales Analysis



**Problem** This \$6 billion regional chain of 400+ supermarkets was facing challenges from stiff competition in its markets due to competitive store openings, and inability to resolve weekly ad space allocation issues leading to weak ad performance.

**Solution** Worked with IT and merchandising to gather item, ad, and category sales and link this to space allocation. Crunched weekly sales data across all ad items at the store level, and systematically combined this with information on item pricing, ad space, and category space allocation on regionally versioned weekly ads.

**Findings**

- Identified category winners and category losers
- Defined workflow for weekly sales data to be ranked for ad performance
- Prioritized ad space allocation for merchandise categories
- Installed system to manage vendor funds

**Result** Successfully analyzed item and category sales for improved space allocation.

## 18. Sales Analysis



**Problem** The specific challenge for this \$8 billion category specialist retailer with 800+ stores was to improve buyer sales projections. Frequent stock-outs of ad items were turning customers off. This had impact on supply chain and inventory costs.

**Solution** Worked with advertising to gather item, ad, and category sales and link this to ad space information. Built system for reporting ad performance on the item, category, and department level. Generated ad lift measures. Combined sales data for all ad items with total sales and entire category sales, as well as item pricing, ad space allocation.

**Findings**

- Identified category winners and category losers
- Defined workflow for weekly sales data to be ranked for ad performance
- Generated dynamic scorecards for ranking buyer performance, category performance
- Prioritized ad space allocation for merchandise categories

**Result** Successfully generated system forecasts that were more accurate than buyer forecasts. Successfully analyzed item and category sales for improved space allocation. Automated image management, ad pricing, and page production of circulars.

## 19. Supply Chain



**Problem** This multi-division retailer with national presence in US and Canada wanted more streamlining for promotional efficiency.

**Solution** Provided supply chain with promotional information in a timely and accurate basis, including all change management and promotional sales forecasts.

**Result** Successfully decreased out-of-stock at this multi-billion dollar retailer, by 6% with EBITDA impact.

## 20. Change Management



**Problem** This national retailer wanted to establish control over change management for items, promotions and prices.

**Solution** Created an online system which could notify all parties by email, pager, or report as soon as a change was made.

**Result** Successfully automated change management for merchandising and advertising, effecting over 2,000 last minute changes last year, and impacting over a billion dollars in promotions. Now all parties are notified immediately of any and all changes that affect them.

## 21. Marketing



**Problem** This multi-billion dollar financial services company needed to quickly produce reports on current financial fund and portfolio performance. The existing method was error-prone and slow. Clients wanted their information quickly.

**Solution** Process was created to link the manual processes of the production department with automated data flowing from information systems databases. These provided financial performance figures for the relevant portfolios and funds, charts, fund manager photographs, various logos, and associated descriptions.

**Result** Successfully enabled the client to automatically produce institutional and fund performance reports for the largest 401(k) funds in the United States, cutting production cycle from one week to overnight.

## 22. Product Packaging



**Problem** This European manufacturer which markets products in 100+ countries needed a workflow solution, and a simple, efficient procedure to get their significant content inventory into print.

**Solution** Software was installed on the client's Macintoshes allowing artists to seamlessly flow copy data and images from databases onto page.

**Result** Client successfully produces packaging and promotional brochures in 37 languages with greater speed and confidence than ever before.