



## The Heritage Shoppe

### Overview

**Country or Region:** United States

**Industry:** Retail

### Customer Profile

The Heritage Shoppe in Illinois sells more than 2,000 collectible items, including unique mouth-blown glass and crystal, brass, candles, pottery, lamps, picture frames and limited editions.

### Business Situation

Although a meticulous record keeper, owner Kris Guill was weighed down by an antiquated paper system that took valuable time away from her customers—the very reason she had started the business.

### Solution

With easy data entry and rapid access to inventory and customer databases, Microsoft® Business Solutions Retail Management System vastly speeds up administrative efficiency, giving back precious hours.

### Benefits

- Time savings of more than 25 percent
- Automated mailers save time, effort
- Accurate reports prevent overstocks
- Discreet access to customer loyalty data

## Gift Shop Owner Wraps Up Inventory and Collects Free Time

“I opened my store to buy and sell interesting accessories, not to do paperwork. My Microsoft system will give me back time so I can spend it making customers happy.”

Kris Guill, Owner, The Heritage Shoppe

The Heritage Shoppe owner Kris Guill always has always watched for the newest and most unique items in the collectible business: crystal, decorative and serving china, English teapots, cozies, lamps, and pottery. So inventory kept growing.

“Our business records were just like our merchandise,” she says, “beautiful and all done by hand. We kept order books, sales books, two inventory books, and our customer book, called ‘The Book that Cannot Be Lifted’—because it was so heavy. We spent too much time writing!”

Guill searched for a retail management system but was unable to find one with all the functions she needed. “I wanted a thorough system, but also simple and organized,” she says. “I saw other stores struggling because they were piecing systems together like a knickknack shelf. Microsoft® [Business Solutions] Retail Management [System] had everything I needed all in one package!”

“Thanks to Microsoft Retail Management [System], we have a good mailing system in place. And we are already saving money because there’s no danger of overstocks. I’m not afraid of expansion because I’ll be using more of the capabilities we have in software we already know.”

Kris Guill, Owner, The Heritage Shoppe

## Situation

The Heritage Shoppe was founded in 1981 and has always been located in the same 1845 historic building in Naperville, Illinois.

“We are well known throughout our community for our collectibles,” says owner Kris Guill. “We started with historic brass and porcelains and, over the years, have added mouth-blown glass and crystal, decorative and serving china, fine English teapots and cozies. Our biggest line is hand-cast caroler figurines by Byers’ Choice.”

The shop also carries collectibles and gifts by Virginia Metal Crafters, Motta Hedeh, and reproductions of Dedham pottery by The Potting Shed.

## Stumbling Blocks to Expansion

As the number of stock items expanded beyond 2000, Guill’s manual accounting and inventory system took up increasing amounts of time.

“It was a very well-kept system,” she says. “Our vendors were amazed at how well we kept our inventory reports, but each manual step took so long. We had two inventory books, an order book, daily sales books, and a massive customer record book that was so heavy we called it ‘The Book That Cannot Be Lifted.’ The paperwork was beginning to choke me.”

As with most retailers, Heritage Shoppe had many business expansion areas that needed management attention: new product lines, gift baskets, direct mail advertising, and Web sales. However, with administrative tasks taking so much time, expansion programs sat on the back shelf.

“Inventory day was a nightmare, but a retail necessity. Somebody had to do it, and it was a real team effort,” says Guill. “In the end, we were only ‘pretty sure,’ not really sure.”

## Costly Mistakes

“Because we weren’t perfectly tracking our areas, categories and departments, we reordered some things we didn’t have to,” says Guill. “Another reason for the accidental over- or under-stocking was uncertainty about what was selling well or poorly. And checking back to see what sold well in previous years meant hiding in the back room for an hour and not talking to customers. I had to trade purchasing for customers or vice versa. That wasn’t why we started the business,” she says. “Something had to change.”

In addition to inventory difficulties, customer mailings required much time and labor. “I used to open up The Book That Cannot Be Lifted and write out our mailers by hand, or my mom did.” Guill says, “That was fine in the beginning because the client list was small and we liked the personal feel. But once the customer files reached a certain size, we just couldn’t keep up.”

## Solution

### Finding the Right System

During her search for a retail system, Guill had an early realization that most retail systems lacked versatility.

“We wanted a computer system that could perform every business function we needed,” she says. “It had to be well organized and conform to the established ways we do business, not the other way around.”

Many solutions were considered, but each was missing certain key functions, and Guill was leery of combining conflicting software. “To save money, other people I knew would throw different odds and ends in together, but it never worked well for them,” Guill recalls. “To me, it just wasn’t the right way to go.”

One day, Guill saw Microsoft® Business Solutions Retail Management System in

“Microsoft Retail Management [System] really is an all-in-one resource for me. I can see customer names and phone numbers and send that list anywhere. I can generate mailing labels, keep vendor databases, and even print vendor information...”

Kris Guill, Owner, The Heritage Shoppe

operation in another local store and started asking a lot of questions. “I immediately liked its clarity, and I knew it would be faster than our manual methods.” She got a referral to her Microsoft partner, Robert Buffo of Merchants Solutions.

“Robert knew Microsoft Retail Management [System] would be right for us. It’s physically compact and has the business tools I need. And, because it’s compatible with my existing PC, it didn’t require more computers,” Guill says. “Robert was a great source of information. Even now he often calls to see how I’m doing.”

#### **Immediate Improvements**

“The changeover was very easy,” says Guill. “We were up and running in no time. And training the staff was simple, especially if they had worked with Microsoft Windows® [operating system]. We printed up function-key summaries and cheatsheets for them, and everybody caught right on.”

Dramatic changes soon occurred in customer service. Mistakes at the point of sale nearly disappeared. Checkout lines shortened. And, in one of Guill’s favorite features, customer histories instantly identified longtime customers to even the newest sales associates.

“The system knows if the person in front of us gets a loyal customer discount,” says Guill, “and it’s very discreet. With a shop full of people, we never even have to ask or mention it out loud—the system puts the customer’s discount in automatically!”

#### **Time and Labor Savings**

Microsoft Retail Management System also allows Guill to send out mailers on a regular basis. “We will always accent the personal touch,” she says, “and our new system allows us to keep that and gives us the automation we need to reach our entire mailing list

instead of just a few at a time. It eliminates so much manual labor.”

Guill sees even more opportunities for efficiency in the near future. “I plan to get a label printer to take advantage of [the] Microsoft Retail Management [System] Label Wizard,” she says, “Talk about a time saver!” Currently, labels are handwritten.

#### **Benefits**

##### **Encompassing Retail’s Requirements**

“Microsoft Retail Management [System] really is an all-in-one resource for me,” says Guill, “I can see customer names and phone numbers and send that list anywhere. I can generate mailing labels, keep vendor databases, and even print vendor information so that new employees know who makes what product. And inventory is no longer guesswork.”

Guill plans to use the system’s purchase order capability to streamline her business even further. “I can already see how much it will expedite the whole long reordering process,” she says. “We can automate and never lose touch with our vendors, who are friends and important business resources.”

##### **Keeping Up With Expansion**

Guill foresees using many more Microsoft Retail Management System functions as The Heritage Shoppe expands. “Bridal season is always good for us, but because the season keeps shifting and expanding, we’re never certain when it is,” she says. “I want to use the system to better define when it starts, peaks, and ends, so we can really be ready before it arrives.”

While looking forward to rapid growth, Guill is not worried about the growing pains commonly associated with it. “Thanks to Microsoft Retail Management [System], we have a good mailing system in place. And we are already saving money since there is no

“Probably more than 25 percent of my workday hours are mine again, and we are becoming more and more efficient all the time.”

Kris Guill, Owner, The Heritage Shoppe

danger of overstocks. I'm not afraid of expansion because I'll be using more of the capabilities we have in software we already know.”

#### **A Bright Future**

Guill reflects, "I opened my store to buy and sell interesting accessories, not to do paperwork. My Microsoft system will give me my time back, so I can spend it making customers happy.”

“Physical inventory will be a huge relief, and the reports I run are phenomenal in helping me inspect business operations. Having a database that knows our customers' histories not only helps us promote to them more effectively but also takes all the worry out of rewarding our best clients.”

Perhaps the biggest benefit Guill has experienced, however, is a return of her valuable time. “Probably more than 25 percent of my workday hours are mine again,” she says, “and we are becoming more and more efficient all the time.”

Guill advises other retailers, “Don't be afraid of automating or upgrading. In the beginning, some here were apprehensive. But now we see that Microsoft Retail Management [System] is a real time saver. You don't realize how badly you need it until you actually start to use it.”

With the return of her free time, Guill can now do what she opened her store to do. “I love my customers, I love my products, and I love my business. Now I can spend more time doing what I came here for and still have time with family. Isn't that what life is all about?”

The Heritage Shoppe's historic building



## For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: [www.microsoft.com](http://www.microsoft.com)

For more information about Merchants Solutions, Inc. products and services, call (800) 486-3214 or visit the Web site at: [www.merchants-solutions.com](http://www.merchants-solutions.com)

For more information about The Heritage Shoppe products and services, call (630) 420-7992 or visit the Web site at: [www.jeffersonhillshops.com](http://www.jeffersonhillshops.com)

## Microsoft Business Solutions Retail Management System

Microsoft Business Solutions Retail Management System offers a complete store automation solution for small and medium-sized retailers, streamlining point-of-sale (POS), customer service, and store inventory management, and providing real-time access to key business metrics. Microsoft Retail Management System is a comprehensive solution for single-store and multi-store retailers that empowers independent proprietors, store managers, and cashiers through affordable and easy-to-use automation. Microsoft Retail Management System has the flexibility and scalability to grow with a retailer's business. It works with the Microsoft Office System, Microsoft Windows Small Business Server, and leading financial applications to provide end-to-end support from the cash register to the back office.

For more information about Microsoft Retail Management System, go to: [www.microsoft.com/pos](http://www.microsoft.com/pos)

### Software and Services

- Products
  - Microsoft Windows XP Professional
- Solutions
  - Microsoft Business Solutions for Retail Management System

### Hardware

- IBM personal computer
- Systemax personal computer

© 2004 Microsoft Corporation. All rights reserved. This case study is for informational purposes only. MICROSOFT MAKES NO WARRANTIES, EXPRESS OR IMPLIED, IN THIS SUMMARY. Microsoft and Windows are either registered trademarks or trademarks of Microsoft Corporation in the United States and/or other countries. The names of actual companies and products mentioned herein may be the trademarks of their respective owners.