

Clarity Helps Regional Grocer Streamline Its Documentation

Challenge

Unified Grocers, the largest retailer-owned wholesale grocery cooperative in the western United States, needed to update its company policies and procedures after a large merger. The company had many disparate procedures and policy documents in different regions, and this was hindering the company's efficiency and level of customer service.

Opportunity

Unified Grocers required Clarity to develop professional documentation that would streamline and define the company's policies and procedures, sales methodologies, products, and services, as well as describe how customers (independent retail grocers) did business with the company. The project required extensive research and the ability to standardize policies and procedures that differed greatly based on regional affiliation. Clarity provided an experienced consultant who specialized in instructional design and technical writing.

Results

The consultant met with Unified Grocers management and determined that three primary deliverables were needed. The first deliverable was a Customer Onboarding manual that contained Unified Grocers' history, sales methodologies, products and services, and policies and procedures, as well as the step-by-step interaction required between new customers and the sales force. The consultant developed a 275-page manual as well as more than 40 PowerPoint® presentation decks. The decks included legal documentation, agreements, and detailed information for completion by customers. Several of the presentation decks were transferred to an online format using a Web conferencing application.

The second deliverable was a How to Do Business with Unified Grocers guide. Clarity's consultant, after extensive analysis and comparison of existing documentation with subject matter experts, wrote a 200-plus page manual describing Unified Grocers' five customer types. The guide included information that defined the centralized company processes as well as the customer-driven systems.

The third deliverable that the consultant developed was a Customer Care manual, which outlined policies and procedures related to taking care of the company's customers. The guide included information on processing invoices, purchases, and returns. To create the guide, Clarity's consultant used a process template that was developed in partnership with the client.

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Clarity enabled the company to:

- Streamline its policies and procedures.
- Update its documentation with the latest legal definitions.
- Improve its customer service.

