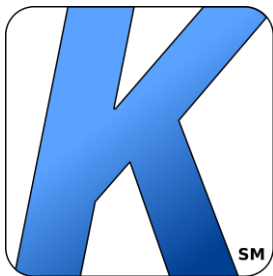


Case Study

Of my work at a previous employer

**From B2B to B2C (DTC) via a Competitor's
Delivery & Installation Network for Next-
Day Delivery of Online Consumer Orders.**



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Introduction

This case study is an example of a company that was nearly 100 years old (at the time) that had a new business opportunity, which required a completely new business model. This project was the top priority, and the executive team appointed me to get it done by leading the order-to-cash workstream. It was clear that if this project was not successfully delivered on time, I would have been held accountable and responsible for missing the deadline. Failure, for any reason, was not an option.

Context

For an enterprise-level project at a multi-million-dollar annual revenue company, listing all details in this case study would impede quick reading. My intention is to highlight skills I utilized, such as project management, process development, collaboration, problem solving, in-depth supply chain and operations knowledge, strong systems knowledge, and customer- and competitor-facing interactions.

Problem

The company's ERP and WMS systems were AS-400s. The company was lacking the capability to deliver and install major home appliances in consumers' homes.

Purpose & Scope

Provide a basic understanding of transforming from business-to-business (B2B) to business-to-consumer (B2C), a.k.a., direct-to-consumer (DTC).

Importance

Supply chain and operations are critical competitive advantages for transforming a company's top- and bottom-line results.

Roadmap

The overview, problem, solutions, and results sections in this case study should prove to be a quick read, informative, and easy to translate to your business needs.

Overview

For several years, we were a high-quality, low-cost, factory-direct manufacturer, B2B. Although the regional distribution network strengthened over time, factory-direct delivery (full truckloads) was the prevailing business model. As e-commerce emerged, consumer behaviors changed. Customer segments were categorized as “brick-and-mortar” or “online”. A golden rule in business is that if a business does not change, its customers will. That said, change was needed.

Problem

We needed to swap out the entire powertrain, not just the engine.

Our systems were AS-400s, the “old green screens,” as they were commonly referred to. The AS-400s were highly reliable; they generated invoices every night, yet their capabilities and sustainability fell short of the mark for operating web-based, high-volume transactions in near real-time.

The factory and distribution footprint provided high levels of service to large markets. Coverage of rural areas was sufficient for B2B. However, DTC required in-home delivery and installation.

BHAG was an Understatement.

T minus 57 Days and Counting.

How are We Going to Hit that Deadline?

This project was part of my professional work experience at an industry-leading manufacturer of major home appliances. Out of respect for one of my previous employers, I will limit references to results and/or volume as generalities.

Additionally, I will keep business names out of this case study for the big-box retailer and the competitor in the appliance industry.

The timeline from project kick-off to go-live was 57 days. That meant long days and short weekends.

Grit. Mental Toughness. Grind it Out.

As the primary liaison with the big-box retailer and our competitor, I led all communications to ensure project success. Also, as the leader of the order-to-cash team, my team's objective was to identify, develop, and implement sustainable processes to support B2C in the following key areas:

- inventory inquiry,
- order receipt,
- inventory allocation,
- order flow,
- shipping,
- invoicing,
- delivery,
- reverse logistics,
- credits, and
- accounts receivable.

I must acknowledge the exemplary contributions of my former co-workers on the following project teams: IT, Warranty, Call Center, Inventory, RAW Materials, and the overall project manager. Their work was outstanding.

Key Solutions (summary)

Systems:

- AS-400s - - Make them work for the go-live, with the assumption that the initial volume was less than peak levels
- The timeline did not support implementing SAP modules, i.e., Sales and Distribution, and Materials Management
- Extensive testing of data transmissions between the company, the big-box retailer, and the competitor
- Modify systems for all new datapoints

Supply Chain Modeling:

- Identify primary and backup ship-from locations to the competitor's delivery and installation network
- Estimate frequency & quantity of deliveries

Transportation: Identify cost-effective methods (potentially deliver one appliance at a time)

Logistics:

- Confirm accuracy of all shipping documents (B2B & consumer-related)
- Estimate return quantities and disposition path forward

Confirm consumer satisfaction by conducting "ride-behinds" for deliveries and installations

Results

We did it! We delivered the company's first consumer-direct order on day 57.

This opened the door to capturing new business with consumers loyal to the big-box retailer.

There was a panic-button showstopper a few days before the go-live.

We planned a test run of the entire process with an employee at the company I worked for who lived locally to the big-box retailer. It was a convenient opportunity for representatives from the big-box retailer and our competitor to be on-site for the test run.

A significant problem occurred the day prior to the test run. Our competitor's system did not accept our shipping documents; thus, the delivery team could not be dispatched. We quickly acquired a new printer that was compatible with our competitor's systems.

When one BHAG is hit, another one starts. 30 days after the go-live, we disabled the AS-400s for this new consumer-direct model and implemented SAP.

Meeting Consumer Expectations.

Consumers make the world go round. When an opportunity like this one presents itself, you move fast. At the time of this project, I was working for my previous employer and residing with my family at a location nearly three hours away (consumer call center director).

Those 57 days were a wild blur. Mondays meant leaving home at 3:30 AM to arrive at the HQ facility and start work by 7:00 AM. Tuesday evenings were typically spent traveling to the big-box retailer for in-person meetings with them and the competitor. Return to HQs on Thursday evenings, and on Friday evenings, arrive home around 11PM to work all weekend long, including checkpoint meetings on Saturdays and Sundays.

If I had to do it all over again, would I do it? Absolutely! Would I recommend that anyone travel that much and work those hours? NO. Leverage technology to reduce travel and in-person meetings when possible. Remember, safety first!