

# Coffee-Enthusiast Clive Coffee Takes the Home Espresso Experience to the Next Level with Acumatica Cloud ERP

## OVERVIEW

Espresso and coffee-enthusiast Clive Coffee took the home barista experience to the next level when its online sales business grew during the pandemic and it added a subscription service and an educational component. But it soon became obvious that they couldn't use QuickBooks, a separate eCommerce system, and order processing with inventory and go through the manual rotations needed to consolidate all the data. So, Clive Coffee implemented Acumatica Cloud ERP, gaining a single integrated platform that provides real-time financial visibility, increased inventory accuracy, and helps Clive continue in its mission to guide its clients in their pursuit of great espresso, design, and quality that lasts.

## KEY RESULTS

- Acquired a single, integrated, cloud-based solution, eliminating manual reconciliation processes
- Provided instant and accurate financial reporting, improving decision making
- Gained deep and connected data transparency, streamlining operations
- Avoided hiring additional staff in finance, scaling transaction volume more efficiently
- Improved the customer experience, shipping products 50 percent faster, exceeding consumer expectations
- Obtained a connected platform for growth that can scale rapidly as the business continues to evolve

## CHALLENGES

Founded in Portland, OR in 2008, Clive Coffee sells luxury home espresso machines and accessories, operates a personalized coffee subscription service, and runs a virtual coffee school. The 45 person staff strives to provide the equipment and knowledge to help consumers attain the perfect barista experience at home.

Initially, the company sold its espresso machines through its showroom and in-person sales in Portland, Oregon as well as through its website. Later, Clive Coffee began offering personalized coffee subscriptions connecting consumers with roasters all over the country when it acquired Mistobox. In 2020, the company launched its Coffee School to help those working from home learn how to become baristas, and adapted its sales efforts to better serve consumers during the pandemic, a move that also included adding a warehouse in Nashville, TN.

"A lot changed for Clive in 2020," says Amanda Datte, Clive Coffee's CFO. "Before, we had a showroom and some in-person sales. But now that everybody is working from home and wanting coffee, we're now 100 percent online and our business has really taken off."

Home espresso can seem very overwhelming, but Clive Coffee demystifies it, providing education from the moment a customer calls or emails and pulls their first espresso shot.

"As the pandemic hit, people were missing their daily espresso or latte, which really began the search for a home barista set up," says Emily Sloan, Director of Marketing. "We had to be flexible and pivot quickly. As consumer preferences changed to home espresso, so did their expectations. We had to be equipped and ready to have inventory on hand and be able to ship it to them within the expected two-to-three-day timeline."

## Need to Replace Disconnected Systems

Clive Coffee couldn't meet those expectations because it used QuickBooks for accounting and bookkeeping, separate inventory software, a different order processing system, and an eCommerce system. None of the systems were connected. "On a monthly basis, we had a laundry list of processes to get the information accurately into our accounting system," says Datte. "There were lots of checks and balances and lots of reconciliations because we manually inputted data."

The company didn't have accurate, up-to-date information or visibility into sales, revenue, inventory, or payment statuses. It would take up to 15 days to close a month, Datte says. "We were growing so fast, and it never felt like we were caught up. As soon as we finished one month, got all the details aligned, got them into QuickBooks, and got our balance sheet up to date, another month had already gone by. It was just a stressful environment."

# CLIVE COFFEE

## Company

Clive Coffee  
[www.clivecoffee.com](http://www.clivecoffee.com)

## Industry

eCommerce: Online Retailer

## Number of Employees

Approx. 45 full time employees

## Location


Headquarters in Portland, OR, with warehouse operations in Nashville, TN


## Products


Acumatica Retail-Commerce Edition with:

- Native Shopify Connector
- Advanced Financials with Multiple Currencies
- Warehouse Management
- Field Service Management
- AcuSync – Bank Feeds & Expense Receipts

## Customer Social Sharing Details

 [www.linkedin.com/company/clive-coffee](http://www.linkedin.com/company/clive-coffee)

 [www.facebook.com/clivecoffeepdx](http://www.facebook.com/clivecoffeepdx)

 [www.youtube.com/user/clivecoffee](http://www.youtube.com/user/clivecoffee)

 [www.instagram.com/clivecoffee](http://www.instagram.com/clivecoffee)

 [www.twitter.com/CliveCoffee](http://www.twitter.com/CliveCoffee)

## Partner Details



Bennett Porter  
<https://benpor.com>

Data was similarly messy in the warehouse.

"Before Acumatica, we had an inventory management system, a separate finance system and a separate shipping station," says Jessica Yutrzenka, Supply Chain and Operations Manager at Clive Coffee. "A lot of our systems were decentralized from an operational standpoint."

When systems are decentralized, she says, "you spend a lot of time analyzing: Why didn't one thing talk to the other? We spent a lot of time either making our data look the same in both systems and understanding why it didn't connect."

## Inventory Hard to Track

As a result, tracking inventory was difficult. "It was really not easy to tell how much we shipped of one product or how many orders were canceled," says Yutrzenka. "Uncovering what day we shipped a product out on was even challenging to get."

As transaction volumes increased, the staff realized they couldn't handle all the manual processes and have multiple siloed systems. "We knew technology could help us grow and become more efficient and so we started looking for an ERP," Datte says.

## SOLUTION

### Versatile, Flexible, Connected

The Clive Coffee ERP selection team researched the big-name ERPs like SAP and Oracle NetSuite and smaller players. "We found a perfect size for us in terms of cost and flexibility, which was Acumatica," Datte says. "As soon as we saw Acumatica demos and heard everything about how versatile it could be, it was hard to keep looking at anything else."

"We knew Acumatica was a solution that we could grow with. We knew that it wasn't going to limit us to what we could do. There is a lot of possibility for Clive and how we want to continue to expand."

Clive Coffee deployed Acumatica Cloud ERP in just six months.

## BENEFITS

### Streamlined Workflow, Real-Time Data

With Acumatica, Clive Coffee gained instant and accurate financial reporting, and deep data visibility.

"As our business is growing so quickly, it's really important to have up-to-date information at our fingertips, at any point, any day, and at any moment," says Datte. "I can look at any point in time to see, 'Are we meeting our forecasted projections? And do we have the right infrastructure to continue to stabilize this growth?'"

"For month-end accounting it's night and day," she adds. "When we integrated Acumatica, I reviewed a checklist we had for our month-end procedures and was surprised that over half of them were eliminated, so it allows us to scale our business without having to hire more people to do this type of work."

Clive Coffee is run by a distributed team located in several states, and Acumatica Cloud ERP's secure cloud access allows the executive team to view financial data at any time. Previously they would have to wait until Datte emailed them a report. "We have our owners in Utah. We have some employees in Arizona and California, and now in this new distribution location in Nashville. It was absolutely a requirement that we have a tool that we can use anywhere and everywhere as we go."

With all data now in Acumatica, a single modern business platform, everything is connected, and many manual financial processes have been automated. "With everything built-in, our invoices now directly populate into our revenue and onto our P&L, and executives can pull information at any point in time," Datte says. "They can see how profitable we are this month. They can see what we're purchasing. They can have many questions answered at any point in time."

# CLIVE COFFEE

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—Emily Sloan, Director of Marketing,  
Clive Coffee

### Access from Anywhere

Anyone with internet access logs into Acumatica and is instantly productive. "I've been in positions where you had to log into a remote server to get to your books, and anybody who has done that before knows the nightmare because it locks you into a particular physical location," Datte says. "Having a system that's in the Cloud where we can use it on a laptop, a desktop, your phone, anywhere that you're traveling at any point in time, is absolutely crucial."

### Improved Customer Experience

"When we switched to Acumatica, it really created a seamless experience for our consumer because our data accuracy, our inventory and the way we communicated with our customers was in one spot and created a single source of truth," says Sloan. "Our department could spend less time monitoring the backend and more time creating marketing content to grow the brand."

With all data housed in a single platform and updated as transactions happen in Acumatica, Clive Coffee can now meet its increased customer expectations. "We're in this era of, you buy something online, you want it at your doorstep the next day," says Datte. "Because our inventory is tied to our eCommerce site, a customer can now see what's available and be able to predict when they're actually going to have it in their house and ready to use."

"If you're in Florida, you no longer must wait five, six days to get something from us. It's going to be two days, which is amazing."

### Real Time Inventory Insight

Having all data centralized has made Clive Coffee much more efficient.

"Because our inventory system is in the same system as our distribution, we are able to receive products in real time and then sell it the second we receive it," says Yutrzenka. "Order cancellations and order edits all happen in that very moment. And distribution is a lot smoother because we have one place for everyone to go to get all the answers they need. How much stock do we have? How much did we ship? How much product did we receive this month? We're able to get that data really quickly."

### Excited for the Future with a Modern Platform for Growth

Because of Acumatica, Clive Coffee quickly opened its Nashville warehouse to serve customers better. "At this point, it's about getting all of our operations up to speed along with continually improving our processes. We are looking at potentially implementing bin locations and serial tracking," says Yutrzenka. "We are looking at other modules and distribution opportunities, as well as the manufacturing and field service modules Acumatica has."

The company is exploring new programs such as refurbishing older machines, opening pop-up retail stores, and offering a mobile educational component. In addition, because Acumatica houses all data in a single system, Clive Coffee executives can focus on the company's future rather than running its back-office infrastructure. "We're really focused on getting to know Acumatica and make use of all its features," says Yutrzenka. "It's extremely intuitive and has so many different modules so you are able to scale your business in whatever direction you want to go."

Datte concludes by adding, "The world is your oyster in terms of possibilities for efficiency and having seamless operations. We feel like we are prepared by using Acumatica for whatever the market has to offer. It's going to be a big part of our company now and into the future and we're very excited to continue growing that."

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—Amanda Datte, CFO, Clive Coffee