Copper Cane Wines & Provisions Uncorks ERP when it Gets GSI

COPPER CANE
WINES & PROVISIONS

Owned and operated by Joseph Wagner in Napa Valley, Copper Cane Wines & Provisions offers a collection of wine brands that present a touch of luxury for everyday indulgence. With names like Belle Glos, Elouan, Quilt, Beran, Böen, Carne Humana and Steorra, these brands are well loved by a wide range of wine enthusiasts.

Founded in 2014 with about 12 employees, Copper Cane has quickly grown into a 167-person organization . "It's been one helluva ride," said Art Ochoa, Director of IT, who joined the company when it needed an enterprise resource planning (ERP) platform that could grow and scale along with it.

The company's first choice was an Advanced Manufacturing Software (AMS) platform that was implemented out of the box. "We just needed something, and we needed it right then," recalled Ochoa. "At the time, NetSuite or a similar ERP was really out of the question because, 1) there was no funding for it and, 2) there was no staff to manage or set it up."

The ERP filled an immediate need, but couldn't keep up with Copper Cane's ongoing growth and expanding IT needs. "We got to the point where we were in dire need of a new solution," said Ochoa. "Our CFO said, 'enough is enough' and told us to go out and get one."

Ripping Off the Band-Aid
This time, Ochoa set his sights on larger, more modern ERPs like Oracle, NetSuite and SAP.

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Company Snapshot

Company: Copper Cane Wines & Provisions

Location: Napa Valley, California

Industry: Food & Beverage

Employees: 167

Brands: Elouan Pinot Noir from Oregon, Belle Glos Pinot Noirs from prime California coastal vineyards, Beran Zinfandels of California, Carne Humana Red and White Blends from Napa Valley, and Steorra, a Brut Sparkling wine made of Chardonnay and Pinot Noir grown in Sonoma County's prestigious Russian River Valley.

System replaced: Advanced Manufacturing Software (AMS)

Solution: NetSuite software and GSI implementation

"I didn't want to look at any of the other mom-and-pops systems out there flooding the market now," he said. "AMS had been around forever and was written in COBOL; API was a foreign concept to them. Trying to interact with any other technologies was painful." Copper Cane also needed a solution that could pivot as it grew, expanded its footprint, added new properties, or got involved with other business ventures. "We didn't want to be in a position where our system couldn't adapt as quickly as it needed to," said Ochoa.

Using a thorough request for proposal (RFP) process, Copper Cane submitted the RFP to only the most qualified ERP implementation partners. "One of those contenders early on was a company that supported NetSuite, which seemed to be the one that was really going to be able to understand our vision," said Ochoa.

When that implementation partner didn't work out, Copper Cane called Darrin Lundie, of ERP Strategy Group, LLC. Lundie works with local producers in Napa Valley, helping them define IT strategy, consider available technologies, and structure implementations, and knew of GSI, Inc.'s strengths in the NetSuite implementation arena.

Lundie said Copper Cane's growth story and technology challenges are common in the Napa Valley winery sector. "As wineries grow, they tend to add people versus focusing on getting the processes and technology correct by addressing the core underlying issues," said Lundie.

From the Stone Age to the New World

With NetSuite in place, Copper Cane has been able to automate operational areas that were previously managed manually, such as uploading orders to its distribution center. "There have been some major transformations as the company goes from the stone age to the new world," said Lundie.

Using NetSuite's application programming interfaces

and GSI's expertise, the company can easily add new and existing applications onto NetSuite. "That's been a huge game-changer," said Ochoa.
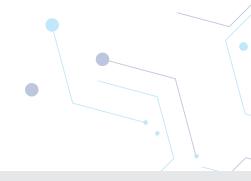
With clear visibility over its end-to-end operations,

Copper Cane's leadership team can make timely decisions based on current data, rather than work with information that might be two weeks old and no longer even relevant. This capability is crucial in the wine industry, where everything from corks to glass to labels has been ordered and accounted for well in advance.

"You can't just go down to Walmart to buy those supplies,

which have lead times ranging from six weeks to six months," Lundie said. "Every minute that can be given back to a business and that helps it make good decisions is pure gold and something that Copper Cane was lacking."

The Icing on the Cake

Under pressure to quickly find and implement a new ERP that would meet Copper Cane's current and future needs—and necessitating a new implementation partner in a pinch—Ochoa admits that the company threw the project at GSI "in the deepest end of the pool and at the darkest hour."

Fortunately for all parties, GSI stepped up to the plate and managed the challenge with ease.

"Not only were we asking them to move us to a new ERP system, but we were also asking to partner with another company (NuVerge) and develop something brand new," said Ochoa. "That in itself was amazing to me, but they delivered and came through for us in a very professional manner."

Reflecting on Copper Cane's successful NetSuite implementation, Ochoa said he can't overstress the importance of GSI's role in that positive outcome. "GSI really did knock it out of the park," he added. "There's still more to be done, but we have our foundation in place and can now start putting the icing on the cake."

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Case Study: Copper Cane Wines & Provisions