



Overview

Country or Region: United States
Industry: Retail

Customer Profile

Tastea offers innovative teas, smoothies, and unique new drinks in the inviting atmosphere of its three tea bars in Orange County, California. The company currently has approximately 95 employees.

Business Situation

The company wanted to ensure that its stores were operating in concert for a consistent customer experience and an easier transition as it adds stores and expands through franchising.

Solution

Tastea adopted Microsoft Office 365 so that it could provide its team members, managers, and franchisees with a cohesive, affordable way to communicate and collaborate.

Benefits

- Ability to focus on business goals
- Scalable tools and resources to support business growth
- Enhanced employee morale
- Cost-effective technologies for increased business value

Tea Bar Stirs Up Excitement for Expansion with New Blend of Technology Tools

“Our ability to quickly expand and open new franchises would not be possible without the turnkey capabilities enabled by Office 365.”

Ted Vu, Cofounder, Tastea

Tastea—an innovative beverage retailer based in Orange County, California—wanted to prepare for expansion while maintaining its high levels of quality and service. The company decided that a key to creating a repeatable customer experience across stores was to standardize operations while opening up clearer lines of communication with team members. Tastea switched from using an assortment of technology tools, including Dropbox and Google Docs, to embracing Microsoft Office 365 as the foundation for its business operations. The company now relies on Office 365 for everything from inventory management to customer service, and it takes advantage of the Office 365 Marketplace to fill specific needs through integrated third-party apps. Tastea believes that it will be able to open more stores, attract franchisees, and enable greater business success through its use of Office 365.



A Budding Idea

Ted Vu dreams in flavors, aromas, and textures. As one of the founders of Tastea, he has brought to Orange County, California, a west-meets-east vision of what a tea bar ought to be. Established in 2001 after a successful trial run with a beverage delivery service, Tastea currently has three locations and is rapidly expanding to include more company-owned stores and open the doors to franchisees across the United States and beyond.

Vu and his business partner, Scott Nguyen, have been meticulous in cultivating the right atmosphere, creative tea recipes, and a high level of customer service. Combined, these deliver on the Tastea promise: a fun place where people can gather together to enjoy innovative new beverages. But ensuring that this carefully crafted customer experience is repeatable is no small feat. "There are only two of us running things, and we can't be everywhere at once, especially as we grow," explains Vu. "We looked ahead and predicted some serious growing pains if we didn't formalize our processes and create systems to help us with every facet of the business."

Identifying the Missing Ingredients

From the start, Tastea equipped its team members with recipe cards, photos of properly made drinks, training programs, and written operating procedures, but it was clear that it would need to do more as the business grew. "We wanted to help our store managers and team members be more self-reliant and give them insight into the company's direction, including our research and development efforts, sales promotions, and store updates," recalls Vu. "We also needed the infrastructure to be able to do things like track and manage our inventory more effectively."

Technology to Support Expansion

Tastea relied on technologies such as Dropbox and Google Docs to share information with its team members, but Vu recognized that Tastea needed to become more sophisticated and move beyond using such disparate tools to run the business. "Our brand matters to us—it's important to have our own domain name. But we couldn't open any document sent using Google Docs unless we also used Gmail. It was counterproductive to have to switch between email addresses, and also we had no control over who could download and print proprietary information," says Vu. "We wanted to streamline our processes, achieve a higher level of professionalism, enhance security, and manage document access more tightly."

Vu investigated other technology options and quickly settled on Microsoft Office 365. "The calendaring functionality in Microsoft Exchange Online grabbed my interest first, because using it would make it so much easier to keep team members in sync across store locations," says Vu. "Then after seeing the parade of tools that come with it, all integrated and centralized in a single service, I knew Office 365 would be perfect for our business."

Everyone at Tastea is taking advantage of Office 365. For example, Vu, Nguyen, and all the store managers use Microsoft Lync Online to hold monthly virtual meetings, saving them the hassles and hours of driving time that their former in-person meetings required. "Being able to meet online will become even more important as we expand geographically," says Vu. "We can hold effective meetings without our managers spending time commuting back and forth."

The company also uses Microsoft SharePoint Online to securely share everything from recipes to human resources forms, and it also includes centralized calendar information about news, product launches, and sales promotions.

An Ecosystem at the Ready

Tastea benefits from the rich variety of applications available in the Office 365 Marketplace. For instance, the company adopted SideKick 365 DCM from SkyLite Systems, a case-management application that Tastea uses to track and resolve equipment malfunctions, customer-service issues, and team member questions. In addition, Vu is developing an inventory tracking and management workflow solution in SharePoint Online that automates many of the steps associated with placing weekly orders to the company's 20 vendors. He is also creating a discussion forum within SharePoint Online so that managers can share best practices, exchange new recipes, and discuss challenges privately. "Between its native functionality, the third-party apps from the marketplace, and the ability to develop integrated custom solutions, we have the ultimate in flexibility with Office 365," says Vu.

The Freedom to Focus

By switching to Office 365, Tastea and its founders are poised for successful growth. "In Office 365, we've got a suite of apps that bring it all together so that we can focus on the bigger business picture," says Vu. "Before, I had to spend so much time and effort 'putting out fires' that it felt like I was just surviving. But now I have the hours and energy to tackle our growth goals—adopting Office 365 freed me up to create, which is what I truly love to do." Since first moving to Office 365, Vu has turned his attention not only to adding apps and

online ordering but also to creating a loyalty program, conducting additional research and development, and building a new Tastea store.

Creating a Turnkey Business

With an eye toward franchising, Tastea now has more pieces of the puzzle in place to create a business model that will be attractive to prospective franchisees. "We need everything to be working cohesively so that franchisees can be confident that they're putting their investments in the right place," says Vu. "By offering them familiar technologies from a trusted provider like Microsoft, we make it more comfortable to get started because everything is easy and right at their fingertips. Our ability to quickly expand and open new franchises would not be possible without the turnkey capabilities enabled by Office 365."

Happier, More Efficient Team Members

One of the unexpected benefits of the move to Office 365 has been the uptick in morale at Tastea. "Before, when we didn't have so many ways to both reach out and to respond, things could be chaotic and team members often felt like they were left in the dark," says Vu. "Today, they're more engaged and truly feel part of our success because we're able to give them the tools and information they need using Office 365. We're getting twice as much work done."

Cost-Effective Tools for Increased Business Value

By choosing Office 365, Vu believes that he is giving Tastea enterprise tools at a small-business price. "The costs are astronomically low; I honestly can't believe that Office 365 is so affordable," says Vu. "We are getting an exceptional return on our investment, and we'll be able to pass along that value to our franchisees."

For More Information

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For more information about Tastea products and services, call (626) 810-0122 or visit the website at:

www.tastea.net

And Vu isn't finished. He plans to tap into Office 365 to follow through on more dreams for the business. First on the list is to empower team member and manager self-service by expanding the company's use of SharePoint Online to add wiki functionality. "I keep learning about more and more that I can do with Office 365—it's been like a shopping spree for me," says Vu. "I just wish I'd switched to Office 365 sooner!"

Microsoft Office 365

The new Office provides anywhere access to your familiar Office applications—plus email, calendar, video conferencing, and your most current documents—on almost any device, from PCs to smartphones to tablets.

For more information about Microsoft Office 365, go to:

www.office365.com

Software and Services

- Microsoft Office 365
 - Microsoft Exchange Online
 - Microsoft Lync Online
 - Microsoft SharePoint Online

Third-Party Software

- SideKick 365 DCM by Skylite Systems