



CUSTOMER SUCCESS STORY:

How Grupo Navis Powers Strategic Growth with Enterprise-Wide Digital Transformation





Digital transformation is a popular goal that very few people truly understand or execute correctly. It is about people, processes, and technology that focus on delivering value to the customer and building the operational backbone. When Grupo Navis was formed, their top priority was to create digital transformation to benefit their customers, employees, and business.

Jari Navarro joined Grupo Navis as Head of Digital Transformation in September of 2020. He saw that Grupo Navis and the companies it worked with were poised to experience a surge in positive growth if they could find a way to streamline processes, successfully collect data, and help their employees manage their time more efficiently.

In this success story, we'll take a deep dive into Grupo Navis' unique challenges and the transformative improvements that happened. Head of Digital Transformation, Jari Navarro, shares an eye-opening account of the pressures Grupo Navis faces and discusses how digitalization is revolutionizing every aspect of the supply chain for them. We'll cover:

- ▶ [Background on Grupo Navis](#)
- ▶ [Constructing the Operational Backbone for Caribbean Produce](#)
- ▶ [The dramatic before-and-after day in the life of a QA Manager](#)
- ▶ [Resolving customer claims and complaints with a continuous drive to offer better quality](#)

To understand the drastic changes, let's first look at who Grupo Navis is and what they did before SafetyChain.



Background on Grupo Navis

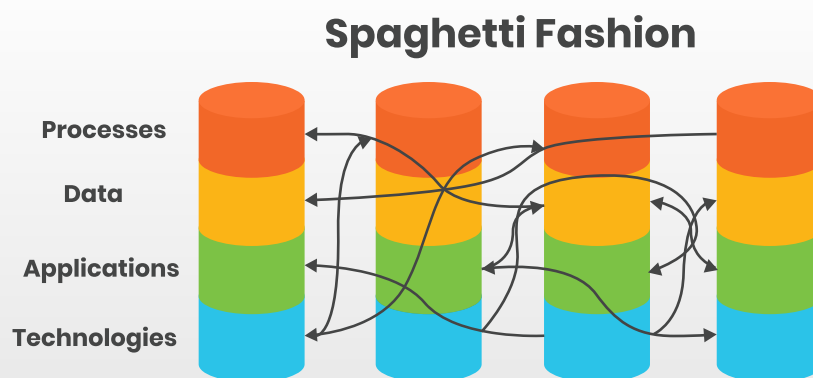


Grupo Navis is a strategic investment firm, supporting a portfolio of companies such as FreshHouse, Caribbean Produce, WanaBana US & Exchange, and Nutriendo PR, an NGO that tackles food insecurity. Jari Navarro, Head of Digital Transformation, wears many hats. He's worked within the supply chain and analytics and as a plant manager and automation engineer. He has a passion for lean manufacturing with a compliance background. Grupo Navis is based in Puerto Rico with supply chain operations throughout the region.

Identifying Current Challenges

Grupo Navis is a vehicle formed for two purposes: strategic investments and provide support to the business units. Quality is a critical competency. Each product company has some process of organization, however, there is always room for continuous improvement. Consider the Spaghetti graphic here. Multiple people are in the same job position and should theoretically be doing the same job between business units. However, each function of the business operated differently with separate standards. Common challenges with this unstructured approach include:

- ▶ Results are not duplicatable
- ▶ Outcomes are not predictable
- ▶ Processes are not teachable
- ▶ Difficult to transfer, monitor, or track individual and process performance



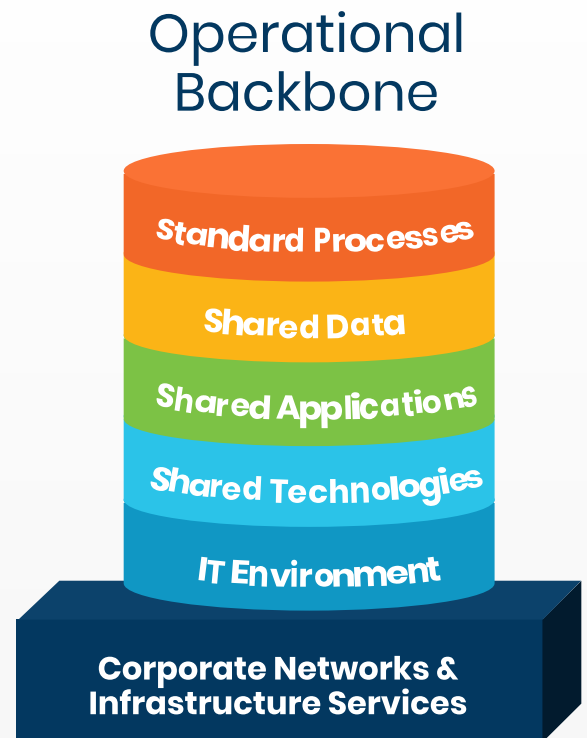
Putting the Spotlight on Priorities

Grupo Navis knew they were in a great position to make fundamental changes to transform businesses. But everything begins with identifying exactly what the priorities are. Creating value was essential, so it was critical to determine actionable steps using digital transformation applied through people, processes, and technology to deliver value to the customers and build a solid and durable operational backbone.

Constructing the Operational Backbone for Caribbean Produce

The first step for Grupo Navis was to get a feel for what was currently working well and what processes could be improved or would no longer serve the creation of value going forward. An operational backbone meant crafting a coherent set of standardized processes in conjunction with supportive infrastructure, applications, and data to ensure the quality and efficiency of operations but designed to fit the unique needs of Caribbean Produce.

The transformation began with the employees, and Navarro championed a “People First” approach. Jari Navarro spent the first month talking to colleagues and departments to find out what people needed and gathered their thoughts on improving the company and their department. After collecting this information, Navarro sought to identify common denominators and patterns.



Mapping the Value Chain and Identifying the Ten Priorities

Grupo Navis mapped the overall value chain of each business unit to understand how they could most effectively support each unit. For example, they found the following value chain for Caribbean Produce:

- ▶ Trading: supplier relationship management, demand management, forecasting, procurement
- ▶ Shipping: logistics, transportation
- ▶ Warehousing: inventory management, receiving, replenishment, dispatch, returns, and cycle counting
- ▶ Commercial: sales, marketing, customer relationship management
- ▶ Delivery: on-time delivery, quality, consistency

Value Chain



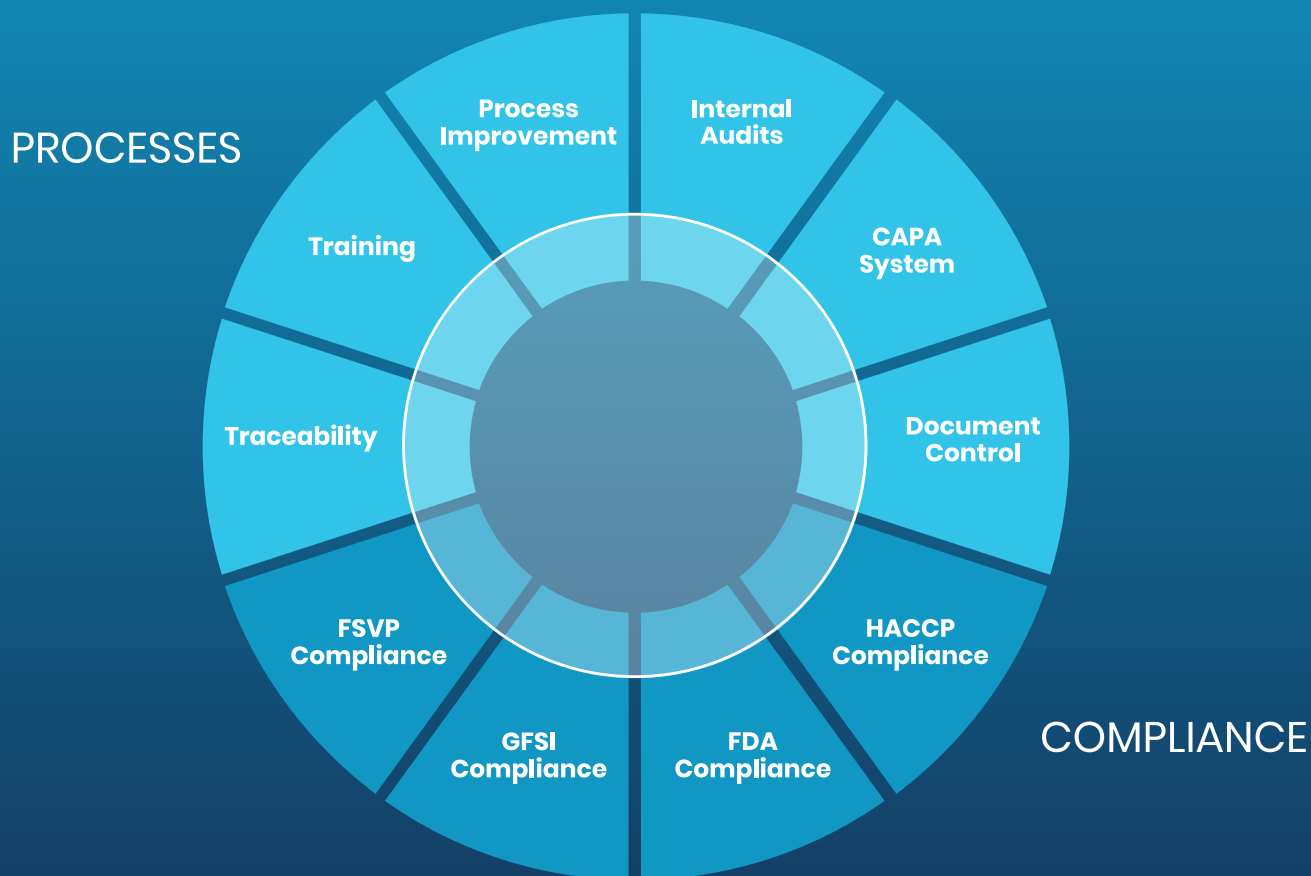
With a map of core activities, they could identify that inventory is a common factor. Quality and organizational excellence tools could improve everything related to inventory management. This helped define where to start.

After an in-depth assessment, they found that these are the key priorities for each Quality Manager.

- ▶ Traceability
- ▶ Document control
- ▶ Training
- ▶ Process improvement
- ▶ Internal audits
- ▶ CAPA system
- ▶ FSVP compliance
- ▶ HACCP compliance
- ▶ FDA compliance
- ▶ GFSI compliance



10 Key Priorities Identified from Interviews



This allowed Caribbean Produce to pursue how it could utilize technology to improve the value change and then expand the technology into other areas. Although tackling even one of the key priorities would be a challenge, They felt there was a way to work on all of them by locating and implementing the right technology.



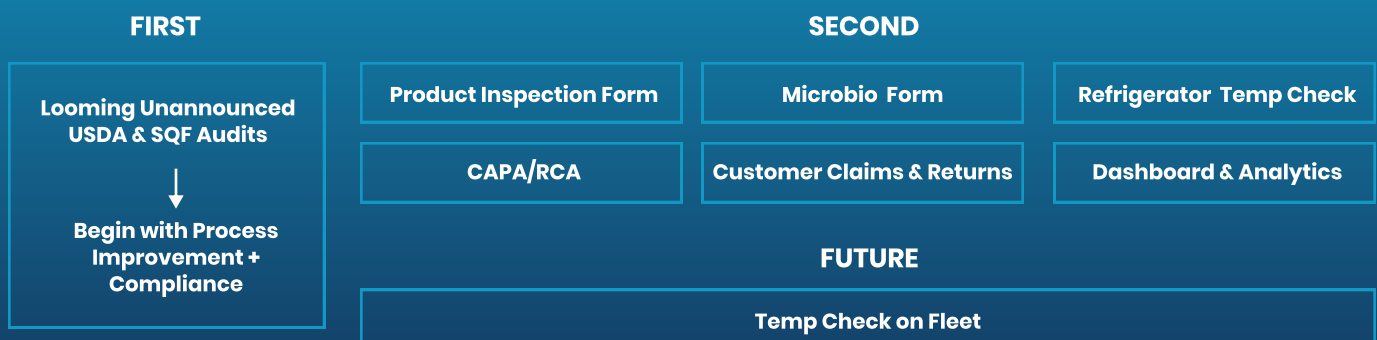
How SafetyChain Emerged at the Top of the Field

Many software platforms are available, so Jari Navarro devised a points system to reduce cognitive bias and identify the software platform that could provide the most value. Grupo Navis began by describing the attributes they considered essential, ranking each feature on a scale of zero to three, with three being the most critical. They then evaluated and challenged the different providers to rate themselves on each item. Each software provider earned a score based on how well they matched Grupo Navis' priorities.

	Need (0-3)	SC Rating (0-10)	SC Weighted Rating	Option 1 (1-10)	Option 1 Weighted Rating	Option 2 (1-10)	Option 2 Weighted Rating
Process Improvement	3	10	30	8	24	5	15
Internal Audits	3	10	30	8	24	3	9
CAPA System	2	10	20	10	20	3	6
Document Control	3	9	27	10	30	3	15
HACCP Compliance	3	10	30	7	21	2	6
FDA Compliance	2	9	18	9	18	2	4
GFSI Compliance	3	10	30	8	24	2	6
FSVP Compliance	3	9	27	10	30	8	24
Traceability	2	8	16	8	16	9	8
Training	3	8	24	10	30	3	9
TOTAL			252		237		112

The second consideration was the cost to implement the software. Grupo Navis performed a total cost of ownership exercise. Both exercises helped them decide on SafetyChain's Digital Plant Management Platform.

The entire process allowed Grupo Navis executives to feel invested in a software decision process that doesn't always involve C-Suite from the beginning. Navarro's early engagement of company leadership allowed them to ask questions about product features and processes, encouraging alignment with plant-level management. Top-down involvement in the assessment of SafetyChain lead to a company-wide understanding of a Digital Plant Management Platform's potential.





Putting SafetyChain to the Test: Unannounced Audits

Although any of the ten priorities were an excellent place to start, circumstances intervened when Caribbean Produce received an unannounced audit only one month after finishing the implementation of SafetyChain. The priorities became compliance with USDA and SQF. In a larger sense, Caribbean Produce also needed to tackle product inspection and process improvement. Caribbean Produce would have to test SafetyChain's ability to drive improvement in only a short period.

The Impact of SafetyChain on that Unannounced Audit

Despite the short timeline, the first unannounced SQF audit after rolling out SafetyChain was a success—the audit occurred only a month after Caribbean Produce fully implemented SafetyChain. The auditors were impressed with the new changes and the drive toward improvement and felt the move toward digitalization was strong evidence of Caribbean Produce's desire to push for continuous improvement. Utilizing a tablet for temperature monitoring allows speedy documentation, and employees can also pull up relevant paperwork even for surprise audits, which improves auditors' confidence in the process.

Ending The Paper Trail

Before SafetyChain, all forms were done manually on paper. SafetyChain provided the tools that allowed Caribbean Produce to track digitally everything from microbiology forms to temperature control. In their facilities, excellent control from utilities is vital to maintaining freshness. The transition has not been immediate, but Caribbean Produce has made steady progress with SafetyChain's software platform. First the need, then the solution, then the tech, then the hardware.

Standardize, Then Digitize

Caribbean Produce recognized that to digitally transition, there was a need to standardize processes. They began to write SOPs utilizing common-sense solutions for those processes. Establishing and reinforcing standards had to happen first to make digitization successful. Navarro recognized that a 100% manual form system for claims and returns was prone to human error and mistakes and made it challenging to extract data that could improve accurately. He wanted first to optimize the process and then improve the technology using SafetyChain.

How SafetyChain Supported the Digital Transformation for Caribbean Produce

At the start of Caribbean Produce's Jari Navarro talked to many employees. He began to see the need for a hub for quality and organizational excellence that could be grown centrally and disseminated throughout the organization and the corporate group. By identifying pain points, Navarro was able to uncover challenges so Caribbean Produce could plot a course of action. One conversation with a QA Manager for Caribbean Produce stuck out because she was able to sum up challenges and potential areas for improvement concisely.

Silvia's Story: A Day in the Life of One QA Manager

Like others in the food and beverage industries, Caribbean Produce must comply with USDA, SQF, customer specs, and other regulatory bodies. Silvia is a QA manager who reviewed data and completed forms manually on paper. Nothing was digital, and the entire process was time-consuming and made compliance a considerable challenge.

Life of a QA Manager

QA TASK	BEFORE SC (Hours per Week)	AFTER SC (Hours per Week)	% REDUCTION TIME
Doc Verification	5	1	80%
Data Analysis	8	0.3	96%
Dashboarding Process	4	0.1	98%
Total Time	17 HOURS	1.4 HOURS	92%

The numbers after implementing SafetyChain are dramatic. Transitioning to SafetyChain saved over 800 hours a year for just a single QA manager. Her time was now freed up to focus on other tasks and deliver more value in other areas without creating additional pressure. As Caribbean Produce continues to implement and experiment with what SafetyChain can do, Navarro expects the numbers to be even more compelling.

“What used to take the QA manager 17 hours a week now only took 1.4 hours, a 92% reduction in time use simply by digitizing them.”



Delivering Compliance in Real-Time with SafetyChain

Rather than relying solely on a yearly audit to determine how a facility is doing with compliance, SafetyChain software allows the company to implement a daily score that can give automatic feedback. When something happens, everyone is notified right away.

Handling Customer Complaints and Claims with SafetyChain

How Caribbean Produce handled claims, inventory returns, and customer complaints was an area of opportunity with multiple challenges. With a farm to fork supply chain, there is no avoiding food waste at numerous points along the chain. From a food waste standpoint, claims and returns are an area ripe for improvement. Before SafetyChain, customers were placing claims over various channels, including customer service representatives and salespeople, and via Whatsapp, phone calls, and even through text messages.

Addressing just a single claim requires collecting a lot of important information, and gathering all of the data through the various channels was nearly impossible. Claims took approximately 88 hours to resolve, even though the target time was within 48 hours.

By standardizing the process and digitizing it through SafetyChain, Caribbean Produce began to realize incredible benefits. Here's the breakdown of the drastic changes with claims and inventory return:

Before:

- ▶ **No denied claims**
- ▶ **The impact was in the seven-figure range USD annually**
- ▶ **Little to no data was collected because incomplete forms were the norm**
- ▶ **The target claim resolution time was 48 hours, but actual claim resolution often exceeded that window**

After:

- ▶ **A new approach with evidence-based claims, including visual data and complete details**
- ▶ **A claim "request" is created, including mandatory information about all aspects of the claim**
- ▶ **Workflows drive cross-department notifications**
- ▶ **Claim turnaround dropped from 48 hours to 1-2 hours**
- ▶ **First-ever denied claims**

For the first time ever, Caribbean Produce denied claims that didn't meet the proper criteria. Whether denied or approved, every claim collects data allowing them to continue improving and ensuring customers make claims properly and quality is always addressed.



How Implementing SOPs Lead to Waste Reduction

Caribbean Produce began moving SOPs onto the SafetyChain platform, making it easier to disseminate policies to all facilities. They created digital claim requests and return SOPs, electronic training and claim forms and reports. To make things easier, Caribbean Produce created a single direct channel for claims. At this time, customers email information, and the claim department creates the claim. Once the claim department fills out the form, it notifies specific stakeholders, and a workflow kicks off that drives a faster near-term decision. Now information and decisions flow, and don't pile up and get stuck like before. Eventually, Caribbean Produce envisions using SafetyChain to have the customers fill out the claim form directly and clip photos into the claim.

A Culturally-Sensitive Approach

There's a cultural aspect that Caribbean Produce faces when it comes to saying 'no.' It is important to protect customers' interests while remaining mindful of their own interests. Collaboration in the supply chain is essential for success, so the goal is to seek a win-win. By creating a better process with SafetyChain, Caribbean Produce could do better for its customers. It's not easy to say no, but the intention is always to provide the best quality product for the customer.

Looking Into the Future

Implementing change is one thing, but maintaining it is even more difficult. Caribbean Produce plans to continue strengthening its operational backbone by asking both employees and customers where the needs are and continuing to examine the processes and value chain. By articulating the exact problems they want to solve, Caribbean Produce can then move toward adopting and refining the appropriate technologies.

Conclusion

Introducing SafetyChain has resulted in many positive benefits, with more expected to come. Caribbean Produce has been able to absorb labor shortage challenges and even continue improvement. Employees can enjoy faster resolution and greater success when performing tasks. SafetyChain has also empowered continuous organic improvement through easy adoption and usability from the executive-level down.

Impact of the Solution

- ▶ **800+ hours saved annually** – for a single QA Manager
- ▶ **Supplier Compliance** – visibility to Quality, Compliance & Operational Improvements
- ▶ **Document Control** – eliminates the use of data from incorrect & obsolete documents & error-free
- ▶ **Audit Ready** – documents needed for unannounced SQF audits are always ready in the SafetyChain platform
- ▶ **Paperless** – no wasted time searching for key documents

Great things happen when people have the right tools that allow them to make better decisions. Employees can redirect that energy to focusing on delivering better products rather than spinning their wheels. Everyone feels empowered to make continuous improvement a reality. Digital transformation allowed Caribbean Produce to collect data at the source and apply it immediately, leading to far better and more skillful decision making.



About SafetyChain

SafetyChain gives over 2000 process manufacturers the flexibility to rapidly address urgent challenges while offering scalability to expand and drive long-term value.

Capture All Critical Data

- Gain real-time visibility into what is happening throughout the facility
- Eliminate organizational silos made worse by competing data sources
- Feel confident your teams are relying on consistently accurate data

Gain Plant-Wide Insight

- Know at-a-glance whether you're hitting your metrics
- Pinpoint areas of improvement to reduce waste, increase yield, and maximize throughput
- Better understand how your teams are performing to create labor efficiencies

Take Rapid Action

- Save time and ensure you're always audit-ready
- Eliminate guesswork so everyone knows what they need to do and when
- Increase efficiency and foster a culture of problem-solving

Plan Scalable Growth

- Drive change, not disruption, throughout your plants
- Ensure the short-term and long-term success of your implementation
- Justify current and future technology investments by reducing waste and increasing productivity

Explore the Plant Management Platform and see how digitized plant management can meet your needs.

Learn more at <https://safetychain.com/digital-plant-management/>