UPNORTH

UpNorth is a Cannabis distribution company located in Northern California with delivery hubs serving dispensary customers throughout the State. UpNorth is a wholly owned subsidiary of Aeriz, a Multi State Operator (MSO) with Manufacturing, Cultivation, Distribution and Retail activities in California, Illinois and Arizona.

Problems to solve:

- Disjointed systems patched together with spreadsheets
  - Lack of visibility into business operations
  - Difficulty in reporting on consolidated inventory across locations
  - Trouble understanding gross margin and profitability

- Redundant data entry, firstly into their inventory management system then again for compliance in METRC, then again into Quick books

- Needed to consolidate multiple company financials and perform expense allocations. This was all done manually in spreadsheets from multiple instances of Quickbooks, resulting in a lack of control and auditability

- Needed to implement inventory controls for purchasing, repackaging and transfers

- Needed better vendor management to ensure compliance and reduce costs

- Wanted the ability to schedule deliveries and cash pickups from customers

- Needed to manage the outside lab testing of product, record the costs of testing and maintain valid COAs

Our Solutions:

- UpNorth worked with Ladd Partners to implement Cannabis Essentials ERP

- Cannabis Essentials ERP runs on the proven Salesforce platform and extends the market leading Certinia ERP with features required by the Cannabis industry

- Cannabis Essentials ERP enables UpNorth to run their entire Distribution operation on a single, scalable platform

- Full METRC integration for distribution and manufacturing greatly reduces time spent on data entry and improves accuracy

- The ability to easily consolidate multiple companies financial statements in the system improves control and auditability

- State specific Cannabis tax calculation ensures tax compliance

- Built in approval processes for purchasing and new vendor onboarding controls costs

- Reporting from a single source of truth with all data located on a single platform, reduces manual spreadsheet analysis and greatly improves visibility

- Upnorth leverages Marketing Cloud for gathering first party data and Experience Cloud to enable vendor self service

- UpNorth empowered their workforce using the free Salesforce Trailhead learning management system to become 'Salesforce zealots', coming from zero background

5% Gross Margin Increase

Saved **3** FTE Headcount

8 Days DSO Reduction

" *Before we moved to the Salesforce platform we had limited visibility into our business, customers and vendors. Implementing this system has revolutionized our understanding and allowed us to scale the business as quickly as we have. I couldn't imagine trying to manage the growth we've experienced using our old disjointed systems"*

— **Joe Jones**, (CIO)