CASE STUDY

A food-services company automates sales and warehouse reporting to streamline daily distribution

A distributor of fresh products replaced a slow manual process with a centralized automated solution that helps effectively manage their daily sales and warehouse operation.

Manual reporting takes a bite out of efficient operations

Fancy Foods Inc., a purveyor of health-conscious protein products to retail and wholesale companies, needed to view sales, inventory, and general-ledger data on an hourly basis. But its manual process couldn't reliably deliver reports each morning, when sales and distributors needed updated data to manage the day's shipments.

The company's sales reporting processes included extensive inclusion and exclusion lists, custom filters, and sorts for each sales rep. Fancy Foods sales team members visit customers daily. Having reliable and updated sales reports are critical to their success in selling on the road. Fancy Foods had invested more than 18 months in an attempt to overhaul its reporting processes and system, but the intricacies of implementing an effective solution that spans business functions and data types was dauntingly complex.

Transform reporting with analytics

Fancy Foods knew they needed a standardized enterprise-reporting platform that could reliably deliver accurate data and support future growth. The food distributor engaged CohnReznick to help it deploy an automated data-driven system that could generate daily, weekly, and monthly tracking reports as needed.

The CohnReznick team collaborated with Fancy Foods stakeholders to assess the company's individual business needs and identify a future-state reporting and analytics strategy. Based on these assessments, Qlik Sense was selected for the reporting and

Business Breakthroughs

- Reliable, accurate sales and warehouse reporting
- Significant improvements in speed of reporting
- Savings of three hours a day in analyst work times
- Rapid loading and processing of Excel spreadsheets
- Boosts distribution capabilities for future growth

distribution platform because of its ability to aggregate data from disparate sources, generate reports from a central hub, easily create customized dashboards, and the option to access the platform via mobile devices.

The first step was preparing disparate data for use in the new analytics solution. To migrate data to a central database, the team installed an automated ETL (extract, transform, load) solution to integrate warehouse management and supply-chain data with sales and general ledger data. CohnReznick also ensured that the Qlik Sense solution could access the core and secondary data sources necessary for analytics.

Next, the CohnReznick team incorporated the sales, inventory, and manual assignment formulas into the Qlik Sense load script. We configured Qlik Sense to integrate with the company's Excel spreadsheets, and used coding techniques to reduce the load and processing times.

The implementation also enabled Fancy Food analysts to quickly create interactive analytics applications and dashboards. To further enhance daily sales and warehouse reporting, we set up Qlik NPrinting, a tool that integrates with Qlik Sense to generate reports in a variety of formats. CohnReznick configured NPrinting to automatically deliver reports to stakeholders' inboxes each morning.

Throughout the project, CohnReznick specialists overcame several implementation challenges that demonstrated their experience with the new solutions and the distributor's existing IT infrastructure and data. The NPrinting tool, for instance, initially could not email reports in PDF-format documents, and the team had to individually define and document IBM AS/400 data and table access to enable mapping.

"During the design and implementation, the CohnReznick team went beyond the call of duty in finding the right solution by meticulously analyzing our required database and reporting requirements," said Doug Hernandez, Fancy Foods manager of IT business systems. "They took care to learn our existing reporting environment to create an effective Qlik Sense implementation."

Finally, by go-live the CohnReznick implementation team had fully trained Fancy Foods employees in generating and customizing reports, and use of the new tools with Excel spreadsheets.

Fast, accurate reporting for future growth

The implementation of Qlik Sense reporting with NPrinting enabled Fancy Foods to create and distribute accurate daily sales and inventory reporting on a consistent schedule—faster and with fewer resources.

Business analysts can now quickly and efficiently manage and manipulate multiple complex spreadsheets. In fact, large Excel documents now load in approximately three minutes, down from the hour-plus load times, which has trimmed as much as three hours a day from the reporting process. Analysts can drop Qlik Sense data into an Excel document to quickly and accurately perform calculations. And sales and warehouse teams now receive easy-to-read reports each morning.

"Thanks to the custom analytics dashboards, Fancy Foods' sales and warehouse teams receive reports that are easy to read and manage on a consistent schedule. Now, the daily sales distribution reporting arrives in each sales rep's mailbox every morning by 7 a.m."

—Doug Hernandez, manager of Fancy Foods IT business Systems

The automated, data-driven sales and warehouse reporting system has enabled Fancy Foods to streamline daily operations and prepare for future growth by more efficiently handling a higher volume of products.

How CohnReznick Can Help You

At CohnReznick, we understand the value of your data and how it can help you boost sales, efficiently manage inventory, and provide insights into business operations. Our Information Management and Analytics practice can help you design a strong data analytics strategy that turns data into informed decisions by creating a centralized repository that incorporates multiple data types and enables accurate, automated ingestion and analysis of data. These capabilities can help you answer the questions you need to create growth and competitive advantages in a data-driven world.

Contact

Connect with us to find out how we can develop a program tailored to your specific needs.

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