

BI and Cloud Services Platform

Event Source, a premier special events industry company with eight different locations wanted to invest in the ability to further drive sales growth and proactively understand company and industry trends. Their traditional ERP reporting environment impacted the company's ability to proactively answer questions, detect trends regarding item and customer buying behavior and easily present data visualizations to their sales reps. Furthermore, a recent acquisition was presenting multiple challenges from a data and reporting perspective.

Key Challenges

- In the absence of a modern BI platform, the company had constant struggles understanding their inventory and purchasing metrics due to the data structure and the fact that it was now coming from separate systems.
- The Purchasing department would spend hours each day exporting and organizing data to be able to perform an analysis which allows them to see trends of their items.
- The ERP system lacks the functionality of being able to monitor and report on which orders changed from the days and or weeks before.
- The company relied on one reporting expert within the company to pull special queries for any ad-hoc requests from their ERP system and distributed unflattering crystal reports.
- Sales, Accounting, Purchasing and the Executive Team relied on static reports that didn't allow for deep analysis, where not readily available and were outdated once finally produced.
- Event Source had multiple cases or process which required a human element and were untimely and inefficient. No automation in place.

Our Solution

We recommended a data management and business intelligence approach that was designed around the Vizion360 Impact Analytics Business Intelligence (BI) and Cloud Services platform. Working with the Event Source management team, we quickly learned about Event Source's current data environment, reporting structure and business objectives and ultimately decided a phased approach starting with Sales data followed by Purchasing/Inventory would prove most beneficial.

The custom designed BI and Reporting Cloud Services solution would provide an efficient and robust platform that supported all of Event Source's reporting and analytics needs enabling the organization to quantify, track and analyze identified key Sales, Purchasing and Inventory performance metrics and eliminating the dependency on manual report writing and creation. The solution provided a data model and reporting platform allowing for the centralization of their data from their systems and visibility into key metrics that can be monitored and measured on an ongoing basis.

Within 8 weeks, the Event source custom BI platform was implemented consisting of Sales, Purchasing and Inventory reporting solutions that addressed their data issues and allowed them to start managing their business proactively with the ability to make data driven decisions and share insights across the entire organization.

Start to Finish: 8 weeks

Business Blueprint and Design – 1 week

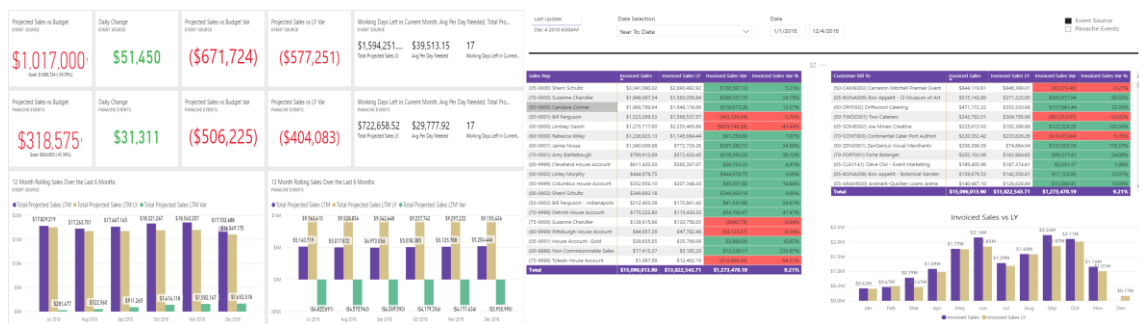
Objectives & Metrics that Matter

We worked with the Event Source management team to understand the current environment and identify/document processes and data flows/procedures and assess their current information visibility and overall objectives. In discussing objectives, we determined a phased approach would provide the most value in the short term and insure stability for long term success as they were committed to moving towards an all-encompassing BI environment. We then began identifying and documenting the requirements of a successful solution. Using our pre-built Vizion360 Applications and industry knowledge, we began brainstorming with the Event Source team to establish KPI's, metrics, calculations, components and reports that would provide the most value to the organization. We then began designing Executive, Sales and Purchasing dashboards, scorecards and interactive reports that would deliver the desired reporting metrics and insights throughout the organization.

Build & Refine – 5 weeks

Implementation – Once we completed the blueprint and design, we began building the proposed cloud services platform which included execution of the technical design, data automation as well as the implementation of our Vizion360™ Impact Portal, Data Warehouse and mapping of the Event Source data to the identified Vizion360 applications (Sales, Purchasing, Inventory). The Vizion360 Cloud Services platform is built upon the reliable and secure Microsoft Azure® platform and all data visualizations and reporting viewed and accessed through Microsoft Power BI and Excel.

Interactive Visualizations and Reporting – The Vizion360 Impact Analytics reporting platform built for Event Source uses Microsoft Power BI. All information and insights are available via desktop & mobile. Each report and data visualization can be consumed and filtered in many ways including by Division, Sales Rep, Customer, Product and a robust Date Selection (Prior Month, Quarter, Rolling periods, YTD, MTD, Current Month, Current Quarter, Current Year, etc.). In addition, all reports can also be accessed via Excel.



Iterative design & go-lives – On week 5, the client had access to the data in the Vizion360 portal for interactive feedback and data validation. Over the next few weeks, we continued to get the client’s feedback, leading to dozens of additions and customizations to model and modifications to existing reports and dashboards by department and user. Weekly status meetings drove communication between our two teams to insure timely management of the changes and confirmation that all modifications to the reports resulted in meaningful insights and actionable data.

Adopt – 2 weeks

Train & support for empowerment – We conducted interactive walkthroughs of the Vizion360 Portal, dashboards and reports with all users. We also conducted in-depth walkthroughs with the identified “power-users”, so that these identified individuals would understand how to build their own dashboards, make edits and changes and ultimately perform self-serving BI roles.

The Results

The new Vizion360™ BI platform immediately resulted in key benefits for the organization that clearly addressed some underlying challenges:

- > Questions that previously took 30+ minutes to answer now can be answered within 3 - 5 clicks
- > Purchasing no longer has to spend hours each day exporting and organizing data to be able to perform an analysis to see trends of their items. Vizion360 automated this process which allows them to perform this task in seconds first thing every morning.
- > The ERP system lacks the functionality of being able to monitor and report on which orders changed from the days and or weeks before. before, With Vizion360, Event Source can now quickly monitor order changes down to the actual order line of what may have changed.
- > Event Source had multiple cases or processes which required a human element and were untimely and inefficient. Vizion has been able to automate process and procedures that once requires a human element to perform, thus driving efficiency.
- > Visibility to open orders, invoices, forecast, contributed value, & profitability by customer, product, sales person, etc. in one place. This resulted in a savings of manual effort and much greater speed to insight.

Delivering Data. Empowering Growth.

To learn More about Vizion360[®] contact us today:
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