



Role of BI in Building Business Relationships

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Biography

Stewart Wright is Founder and Director of YourDMS Ltd (<https://www.yourdms.net>), and has over 25 years in the Document and Data Management industry offering extensive senior management experience, delivering high-quality products and services.

Working with companies such as Invu, Abbyy, Sisense, Cumulus Pro, Draycir, Microsoft and Fujitsu to deliver business-critical software and solutions to organizations from 3 to 3000 users, YourDMS provides tailored, efficient document management, process management, and business intelligence solutions to companies seeking to reduce costs by improving their data capture, data analysis and reporting, workflows, accounts payable processing, and email management.

*Stewart blogs at <http://www.yourdms.net/blog>
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Abstract

In a rapidly evolving retail landscape, businesses are generating data at an alarming pace but it often exists in silos across the business making it difficult to gain an accurate, real-time overview of how the organization is performing. In this article, the author explains how by using an effective a Business Intelligence (BI) solution companies can become more agile and proactive.

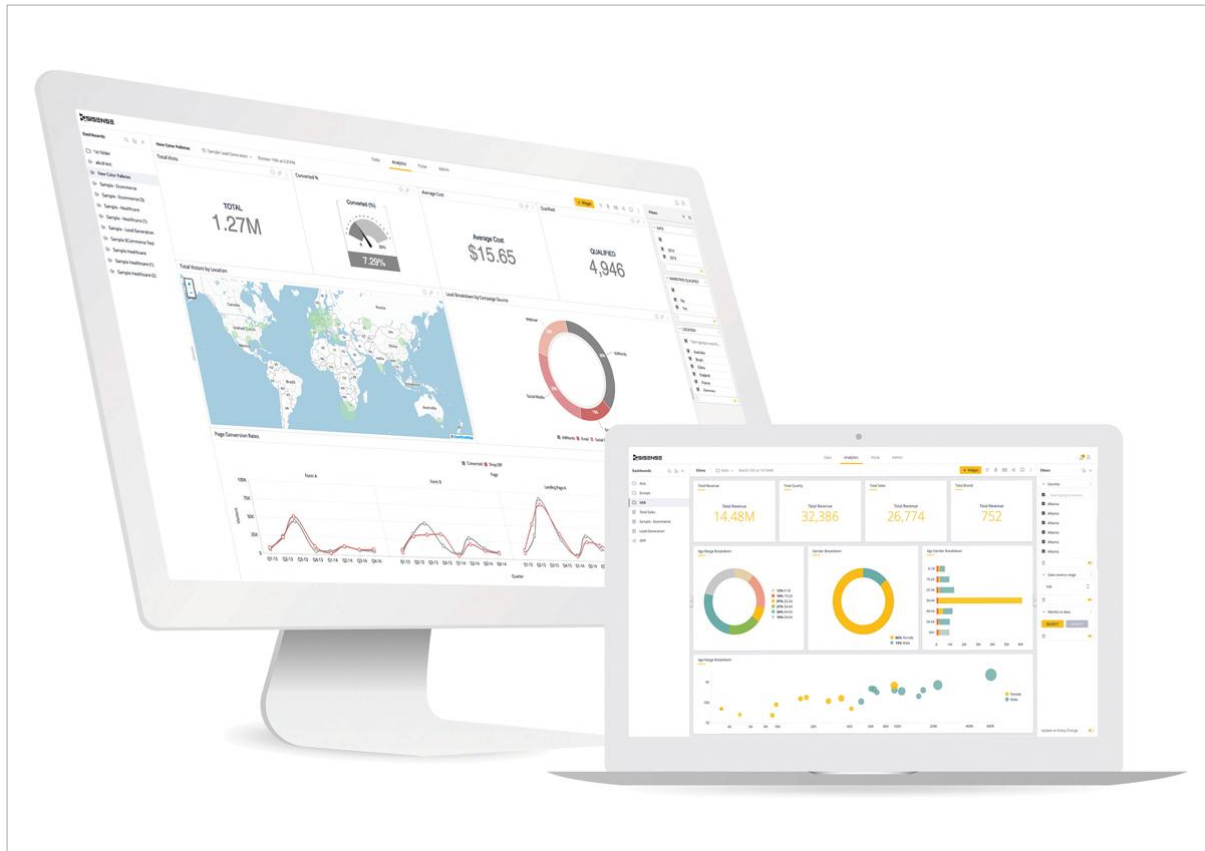
Introduction

The best business relationships have a certain synergy, and that synergy is especially important for sustaining long-term business relationships that stand the test of time. A long-term business relationship should feel secure but expansive, with room to grow into new opportunities and address changing needs. It is therefore critical that business solutions providers and consultants never miss an opportunity to expand their services into an area that complements their current offerings and supports the continued growth of their clients.

In an age of Big Data, your clients don't just want the solutions you are providing – they want the data transparency necessary to calibrate those solutions, test their effectiveness, and scale. For the most strategic providers, partnering with a scalable Business Intelligence (BI) platform committed to your success is the answer – giving you the power to nurture your long-term business relationships with data transparency and actionable insights.



Analysis



Expanding offerings to grow business partnerships

YourDMS was founded in 2007 as a document management and solutions consultancy. Our teams consult and implement document management solutions for growing businesses to streamline administration and accounts payable departments. Over the years, we have expanded to provide workflow automation and outsourcing services, and one of our longest-standing clients grew right alongside us. With the support, consultancy, and solutions provided by YourDMS, Pet Family expanded beyond a chain of successful pet food stores to include dog day-care centres, pet grooming facilities, pet clinics, and multiple brands of natural pet food.

During this ten year business relationship, we discovered a new paradigm in business intelligence, data, and analytics. As Pet Family was scaling, their data was growing faster than they could handle!

More data, more problems

As business expands, data expands. Whilst at YourDMS we were covering the document and workflow solutions required to manage the entire Pet Family umbrella of businesses, from procurement to sales, logistics, warehousing, accounts, HR, and beyond, but unlike the solutions and services offered by YourDMS, we found that Pet Family's BI platform wasn't scalable. When it came to business problems, Pet Family was paying us to have the solutions.



Their legacy business intelligence software could only spit out massive Excel files, and with the sheer volume of their growing data, they would have needed a team of data scientists working full time to extract actionable insights. Pet Family simply couldn't expand any further without a single source of truth and full data transparency across their multiple businesses. They needed their employees focused on creating new products and dreaming up new expansions – not wrestling with massive data dumps.

Building a BI partnership with Sisense

We knew it was time to expand our suite of solutions to include a robust BI platform (<https://www.yourdms.net/solutions/business-intelligence/>) that could handle big, complex data from multiple sources. But it was critical to me that the solution we selected wasn't a band-aid for a single client. I wanted a long-term business partnership with a BI platform that I could easily scale and provide to additional clients.

The success of YourDMS has always hinged on the quality of the solutions we provide and the relationships we build with our OEM suppliers. I require that every solution and software we endorse, tailor, and provide to our clients gives me that same feeling of synergy and mutual commitment to success that I feel with my own clients. I wanted a platform flexible and scalable enough to serve the Pet Family empire as a test case and one that I was confident could expand with us to serve our other growing clients as well.

Looking toward the future with a BI partner

For Pet Family, Sisense was the boost they needed to continue their expansion with confidence. Not only are documents and workflows streamlined, but all of the data from their different businesses and branches funnel into key dashboards, allowing management to view a single source of truth on any given branch, business, or the entire Pet Family empire.

Meetings with senior business management used to start with, "How are we doing with X?" Now they start with, "We've all seen what's happening with X, let's discuss action steps." Senior management have never felt more secure or empowered to make the kinds of business decisions that used to go unattended for months while they waited on the data.

For the team at YourDMS, a successful Sisense rollout to a high-value client is just the beginning. Pet Family's request for better BI served as a catalyst for us to identify and partner with a BI platform committed to our success and the success of our clients. Because Pet Family is only the first of many YourDMS clients who will benefit from the power of Sisense.

Reference

YourDMS will be running a series of BI webinars throughout 2020.

For more information see <https://www.yourdms.net/blog/business-intelligence-webinar/>

PETS CORNER CASE STUDY

Established in 1968, Pets Corner is the second largest Pet retail business in the UK with 155 stores nationwide, 10 Dogwood salons and an online presence. They are part of the Pet Family Group along side Pet Practice veterinary services, Doodley Dogs dog crèches, Great&Small pet accessories, MORE and Green Acres pet food, and Dogwood dog spas.



“I don’t know what question I want to ask tomorrow for my business. Next Generation BI gives me the flexibility and speed in order to act.”

Iain Dougal
CHIEF FINANCIAL OFFICER AT PET FAMILY

ANALYSIS

Pets Corner had been using Business Intelligence (BI) for over 10 years but they were aware that it wasn’t giving them accurate, real time reporting and analysis of their data. Iain Dougal, Chief Financial Officer of Pet Family, didn’t have one place where he could see exactly what was happening across multiple systems and departments within the multiple businesses that belong to the Pet Family Group.

They use several different systems to manage stock control, sales, and personnel, and wanted to combine the data from each system to gain a comprehensive, real time view of the business.

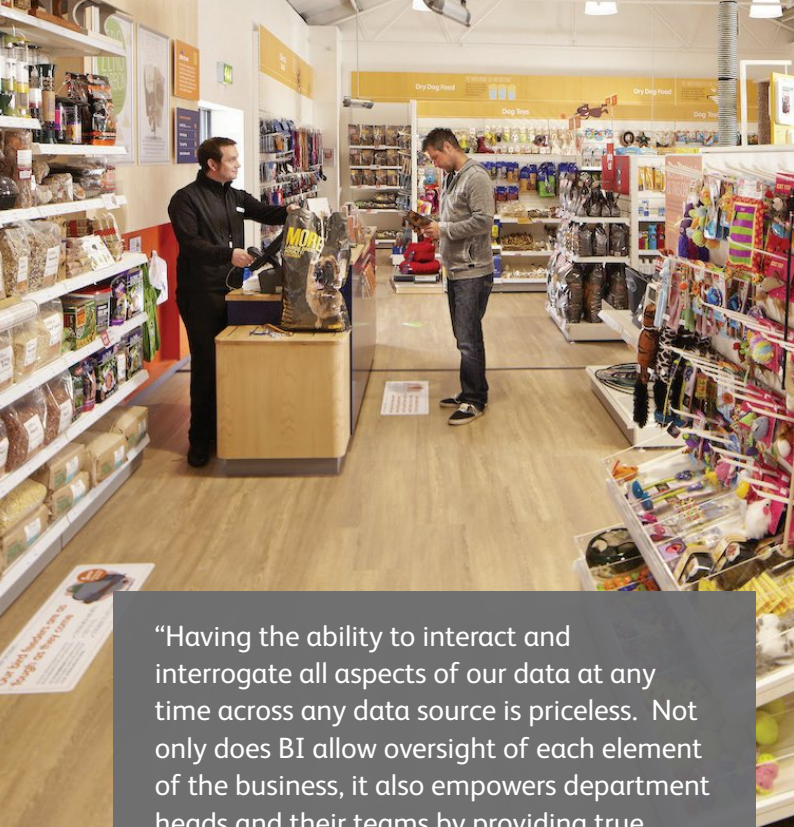
Interpreting and reporting on the different sets of information that they received from different departments and companies within the group was extremely time consuming and prone to human error and interpretation which meant that the data was often out of date by the time ‘Dougal’ had seen it. He also needed to be confident that the data they were using, and the answers it was giving them were correct.

The current BI system wasn’t self serving and generating reports had to be outsourced to their software provider at an additional cost.

Dougal and his team needed to be able to analyse and compare data from different months and years to look for patterns and trends, so it was essential that there weren’t gaps in the data and reporting.

To ensure continued growth and success in an uncertain economic climate, Pets Corner needed a new system that could combine all of their data sources across the group and provide real time analytics and reporting. It needed to be accurate, quick, easy to use, future proof and scalable to grow with the business.

They talked to YourDMS about utilising a Next Generation Business Intelligence solution to deliver the insights they needed to make the right decisions for the business.



“Having the ability to interact and interrogate all aspects of our data at any time across any data source is priceless. Not only does BI allow oversight of each element of the business, it also empowers department heads and their teams by providing true analytics, giving them the ability to act with accuracy and confidence.”

Iain Dougal
CHIEF FINANCIAL OFFICER AT PET FAMILY

YourDMS SOLUTION

YourDMS recommended a Sisense Business Intelligence solution. Sisense BI would be able to combine all of Pets Corner’s complex data sources, enhancing what they were already doing and allowing them to get the answers they needed quickly and easily.

Live data and analytics would be presented via interactive dashboards and alerts that could be used by the whole team, providing instant insights and generating reports at the click of a button.

YourDMS knew that the most important step before implementing a new solution would be to review Pets Corner’s existing data and see how ‘clean’ it was. Their approach was to create a strong foundation by supplying the BI solution with complete, clean data from the start, rather than having to deal with the issues caused by using ‘bad’ data once the solution was in use.

A thorough review of the data uncovered instances of missing data, duplicated data, codes for the same items that differed between systems etc. With these problems corrected just once at the source, rather than many times at the end, YourDMS were ready to implement the new BI solution and combine data from multiple sources including stock control and EPOS systems.

RESULT

The new BI solution has allowed Pets Corner to view and explore their data in real-time, via an interactive dashboard, and instantly get the answers and insights they need. As the solution is cloud based, users can view dashboards on any web enabled device allowing Dougal to check data and receive insights on-the-go, wherever and whenever is convenient.

Collaboration with colleagues and stakeholders is easy and reports can be created and shared in minutes.

Extensive cleansing and testing of data has improved accuracy and Pets Corner now have peace of mind that what the Sisense dashboard shows is happening in the business, IS happening. Building trust in the accuracy of their data and the BI system was an important step in encouraging other departments to begin using the new system in favour of spreadsheets and manual processes. Now when Dougal walks into the office, every screen is showing a Sisense dashboard which he thinks is fantastic. “We’re no longer wasting time on data and reports, it all happens instantly” he enthuses.

In Procurement, saving time on reporting has allowed the team to focus on what they do best - developing new products, improving their supply chain and other tasks that will generate revenue for the business. They are using BI to see how products and promotions are performing and will share this useful data with suppliers which in turn will allow them to make informed decisions. This will also lead to stronger supplier relationships.

In Accounts, the finance team are using Sisense to report monthly Management Information sooner. Traditionally this is published on 21st of the month but Dougal expects to be able to publish it up to a week earlier in the future which would result in large financial savings in time taken to analyse data and generate reports.

BI is also being used by the finance team to deliver accurate forecasting which is essential for the business and its profitability. They no longer need to wait until month end, they can now analyse sales data the next day allowing them to make faster, better decisions.

The Sisense BI system has allowed Pets Corner to operate in an agile and proactive way, using their combined data to inform business strategy and decision making. They can now act on the insights they get from their data within hours, rather than weeks.

Pets Corner are confident that they will continue to find new areas of the business where BI can add real value. As Dougal explains, “I am excited about the endless possibilities of what Sisense can do for the business.”

