



Customer Story

SMC Electric Supply Creates Seamless Workflows Between Disparate Data Silos with Informer Dashboards

Conversation with Jesse Owsley, Software Program Manager, SMC Electric Supply

Pain points

- Reporting capabilities within the organization were very limited
- Need to enable efficient, streamlined workflows across multiple disparate systems
- Challenging to efficiently spot exceptions or data discrepancies in real time that could evolve into bigger problems

Results

- SMC staff now can access and manage data without IT intervention
- Configuration and security environment is much more manageable
- Can manage client relationships using real-time data, easily accessible prospect and customer insights



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Challenge

SMC is a private, family-owned corporation headquartered in Springfield, Missouri with 14 locations in Missouri and Kansas. The company distributes the industry's top automation, data comm, electrical, industrial, pneumatics, safety and security products, typically used in manufacturing facilities, from over 250 manufacturers.

When Jesse Owsley, software program manager at SMC joined the company, he quickly realized that reporting capabilities within the organization were very limited and not sufficient for business needs. SMC had multiple databases that held important data. Their business had limited reporting abilities. Staff was either making do with native application reporting, using SQL Management Studio or having an IT staff member write custom reports for users.

SMC needed to enable workflows across their multiple systems including Progress/NextGen ERP, document management, proof of delivery, and CRM. It was important to tightly monitor and track orders, inventory and payables as data moved between departments. Hundreds of thousands of records must be managed and exception reporting is very important. Because the data was in disparate systems, it was challenging to efficiently spot exceptions or data discrepancies in real time that could evolve into bigger problems.

For example, SMC uses Tour de Force as their CRM. Customer and product data in their ERP is highly dynamic and making changes in the ERP would easily cause discrepancies in the CRM because Tour de Force was expecting the data in a certain way. "This caused issues with user adoption and confidence in the CRM data," said Owsley. Prior to Informer, Jesse created a spreadsheet to keep track of outlying information as he found it. This was an incredibly tedious and manual process.

Accounts Payable staff at SMC were also using spreadsheets to reconcile invoices and purchase orders containing prices charged, freight, product information, etc. Prior to Informer, clerical staff had to call Buyers and manually compare spreadsheets to reconcile data, another manually tedious workflow.

Solution

Owsley and other staff at SMC knew they needed an easier, more efficient way of accessing and managing data and workflows across the separate data sources. After a free trial, SMC soon implemented Informer and were up and running in a few days. "Including the time it took to spin up a server, install Informer, connect to the initial data sources and to do the first application training sessions via telephone, I had less than 8 man hours invested in getting my first production reports which I continue to use to this day," said Owsley. "Setup was my number one concern, but it was very straightforward. I'm not a technical person, but I could do most of the setup and mappings myself."

Jesse recently upgraded to Informer 5 and is generating Dashboards that have created seamless workflows across the business. By connecting to the various data silos, Informer enables SMC to compare data from diverse business systems in one place. The visuals blend real-time data from multiple systems onto dynamic dashboards where he can then easily drill into underlying data in the source systems.

Results

SMC staff now can access and manage data without IT intervention. End users use Informer to run their own ad-hoc reports and Dashboards to then distribute to many others. Managers, vendors, and other staff members can view report PDFs or even Live Excel spreadsheets with Informer data, all without ever having to access the software itself. "Now SMC only needs to maintain one ERP license because they provide the access to data that the staff needs through Informer. We are saving on ERP licenses and with just that, Informer can pay for itself. Our configuration and security environment is much more manageable," said Owsley.

By creating an Informer Dashboard that shows all unfulfilled orders by location on a Google Map, SMC is now able to track orders that come in from the eCommerce system and sync that information with data in the ERP. Now they can manage client relationships using real-time data and put prospect and customer insights at their fingertips. Lizabeth Huntley, Product Analyst at SMC indicated that Informer 5 gives her "so much more flexibility than what she was used to in Salesforce.com."

By setting up Informer Dashboards that both Accounts Payable and Buyers could look at, Jesse dramatically improved the workflow between the two departments, enabling them to track and reconcile data from the ERP. Informer also pulls data from their document management system onto the same Dashboards which streamlines communication from Buyers.

SMC also set up inventory Dashboards that overlays product and pricing information with Google Maps. This enables sales reps to easily manage customers in their territories and more efficiently onboard new customers. With inventory Dashboards, SMC monitors the status and accuracy of orders that are being shipped to customers by displaying several key metrics like order accuracy, arrival times, and the number of units shipped to each customer. The Dashboards refresh with real-time data to allow the team at SMC to ensure a high level of customer satisfaction by proactively notifying customers of any issues.

Using Informer, SMC has been able to better manage customer relationships from a multi-channel perspective. “We can see which areas are spending marketing money and determine where to spend marketing dollars based on sales in that area with a Dashboard that maps sales and marketing spending by zip code,” said Owsley. “This is a powerful visual to show decision-makers as they decide on marketing program spending.”

SMC has also used Informer’s Jobs feature to set up a scheduled report that runs every day, comparing order totals in the ERP with total’s in their Tour de Force CRM. “Finding exceptions before was a nightmare. Now we have confidence without having to manually track any potential issues. It’s just a Dashboard that shows up in my email every day so if a sales manager calls me and asks a question I have the information at my fingertips,” said Owsley.

SMC also uses Informer to distribute important information to vendors. Many vendors receive weekly or monthly reports on inventory, location, and sales of products. SMC can now gather all this information for the vendors in Informer by querying one or several data sources at one time, saving hours. “We can format these reports how we like as well, in CSV or PDF form, for various vendors. Periodic sales reports, itemized sales histories, and proof of delivery reports can all now be run easily and distributed to vendors without any effort on our part,” said Owsley.

“Another aspect of Informer that I really love are the ways I can export my query results for other people to see. Sometimes I don’t want the people consuming the data to see everything, only the pieces that they need. Live Excel is a great way to do that, and our users don’t need extra Informer licenses. That feature alone has fulfilled our ROI for Informer,” said Owsley.

SMC now uses dashboards to visually represent important data and administrators control who sees and manipulates data. “I can send out or embed a dashboard for others to see but control at an admin level who can see and drill down into the data behind it. The security in Informer is very granular and it’s been great to be able to control access to everything down to the row level. We know exactly who has access to what data,” said Owsley.

With Informer, SMC has seen great improvement in data management and overall business transparency. Whether tracking order fulfillment for vendors, reporting on new ecommerce customers as they sign up via website, or creating top-level charts of sales performance, SMC now can manage daily operations in an easy, transparent way, all through Informer.



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