



# Wholesale Distributor

## Customer Story

# Privately Held Wholesale Distributor Achieves Comprehensive View Into Overall Businesses With Informer

*Conversation with Business Intelligence Director, Privately Held Wholesale Distributor*

### Pain points

- Inability for everyone to easily access and analyze data for timely decision-making
- Need to combine data from multiple acquired businesses to gain an overall view
- Missing the modern analytics environment necessary for a growing company

### Results

- Ability to pull, cleanse, and prepare data from numerous disparate sources into curated reports
- Limitless data exploration for technical and non-technical users alike
- Analysis of data points at consistent time intervals to understand inventory trends



## Wholesale Distributor Customer Story

### Challenge

With over 300 employees and over a dozen locations across the United States, this privately held company is a leading business-to-business wholesale distributor of equipment and related parts. The Company offers customers access to an inventory of over 12,000 products as well as maintenance, repair and operations (MRO) parts from over 400 manufacturers.

The distributor had been using Entrinsik Informer since 2006. Prior to implementing Informer, only a few individuals within the company conducted data analysis. They used spreadsheets containing a tremendous number of rows. Due to the time-consuming complexity of working with this data, only one person had intimate knowledge of the information and was able to glean meaningful insight through analysis.

The Director of the company's BI Department previously worked there and used an early version of Informer. After leaving the distributor, he returned in 2017 and was asked to build a new business intelligence architecture that would enable people throughout their organization to easily access and analyze data to make better and more timely business decisions.

Not only had the company been growing organically, it had also grown through acquisition by acquiring multiple businesses in 2017. The challenge this presented lied in pulling data from the different businesses to get a comprehensive view into the overall business.

One of the newly acquired companies continued to use their own systems for data capture and reporting. Still, the BI Director needed to track metrics and key performance indicators (KPI's) and produce operational reports for the combined business. In addition, the distributor's business development group relied on him to pull together consolidated reporting and dashboard views for bi-monthly board meetings.

According to the BI Director, it was also important to build out stories for analytics, for example to understand the new company's buying journey work flow, including:

- Work orders created
- When work was completed
- When work orders were turned into billing
- When work orders were turned into invoices
- When invoices were sent out
- When payment was made

The BI Director's vision for their new BI architecture required a modern data analytics environment that supported the success of the distributor's growing business.

## Solution

In April 2017, the BI Director decided to attend the Entrinsik Informer Users Conference. He was totally blown away with the new, redesigned version 5. The design features and functionality of Informer 5 fit nicely into his vision for a modern BI architecture.

One of the BI Director's key requirements was having strong ETL functionality to stage the data coming from different sources – one of Informer 5's many strengths. With Informer 5, he pulls disparate data from over a dozen data sources (Postgres SQL, UniData, Microsoft SQL Server, etc.) and large spreadsheets into one place. Then with Informer's unique Data Flows feature, he reviews, cleans, and prepares the data as it streams into Informer and builds curated Informer Datasets, Informer Reports and visualizations for different stakeholders.

## Results

The BI Director started using Informer 5 in July 2017 and immediately started generating ad-hoc reports and visualizations for several managers and executives.

To accomplish the consolidation of data necessary for analysis, he worked with the newly acquired company's IT team to extract data from their FileMaker database and import that into Informer as separate Datasets. These Datasets range in size from 2K rows for the customer set to 3.7 million rows for the line item detail set. After the consolidation process, the core data file resulted in 700K rows with around twenty columns. With this data now blended, he generates graphics and KPI reports that the business development team uses for board meetings. According to the BI Director, "that's working great!".

The BI Director also generates dashboards and reports that he publishes out to various business groups. He uses an inventory Dataset to pull an inventory status report every morning using real-time data from 3 different data sources (2 SQLs and a UniData database). That information is disseminated using Informer's Jobs feature which sends automated daily emails that include a link to inventory updates and dashboards.

According to the BI Director, people love the visualizations and the ability to drill down into the details behind the data to quickly see what's going on. "The crown jewel of Informer is the Discover feature which enables people to easily explore data on their own with lots of configuration options". Users, regardless of technical ability, can use Informer to explore data and create ad-hoc reports and dashboards. He also loves using the folder structure in Informer 5 to organize the Datasets as they grow.

The folks at the distributor who had been previously using Excel pivot tables were blown away with Informer 5's speed, ease of use, and the ability to explore data in almost limitless ways. "Pivoting on data is so much easier now," according to the BI Director. "You can immediately slice and dice the data in multiple ways." He also likes the ability to add multiple series in Informer 5 where he can analyze a sequence of data points at consistent time intervals over a time period to understand inventory trends across the business.

Other areas where they use Informer 5 include:

- As a management tool – the BI Director pulls together data for operational analysis, planning and purchasing decisions for the leadership team and for use when they meet with vendors and manufacturing partners. The BI Director commented, "Entrinsik is making me look impressive with Informer."
- Supporting the sales team – the BI Director sends reports with information that matters most to them.
- Analyzing operations, including freight.



*Entrinsik is making me look impressive with Informer.*

**Business Intelligence Director, Privately Held Wholesale Distributor**