Seafood Manufacturer

Overview

SC&H Group collaborated with the organization to modernize their weekly sales reporting process and create a single-source of truth for product sales. The solution, powered by automation and data visualization through Power BI, has given the Executive and Sales teams access to 3+ years of trends for Units Sold, Weight, Sales and Margin KPIs across Product Category, SKU, Customer, Channel, Representative and Broker. In concert, the solution also reduced 6+ hours of manual effort per week to produce the legacy Excel based reports with an automated, 14-minute refresh process.

CLIENT INDUSTRY

Seafood Manufacturing

DEPLOYMENT LOCATION

North America

SOLUTIONS DEPLOYED

Power BI

LEGACY PLATFORM

Seasoft / Microsoft Excel

Top Client Objectives and Challenges

- Seasoft ERP software didn't provide modern reporting capabilities

- Client's stopgap reporting solution (data pulls into Excel) was time consuming and prone to errors due to manual nature

- Legacy process relied on institutional knowledge by a small group of employees

- Outdated pivot table reports didn't provide visualization capabilities, historical trending, or ability to generate new reports/analysis of modern reporting tools

- Weekly data refreshes taking up to six hours per week to complete

Results

- Enabled Executive and Sales team direct access to Sales Reports (via a web browser or app) that is automatically updated every Tuesday morning

- Created completely custom reports with modern visualizations to help users easily spot important outliers and trends

- Removed manual data pulls and sales report extracts from Seasoft by connecting Power BI directly to the source

- Utilized native Power BI features (e.g. Power Query) to replicate/replace the legacy custom business logic from the Excel files

- Power Users still have same access to the underlying data that they had before by using the "Analyze in Excel" feature of Power BI, with no need to run reports directly from Seasoft

Key Benefits Achieved

Our client now has a completely automated sales reporting process which is absent of manual effort to prepare/reconcile the reports, while at the same time allows consumers to access the reports from anywhere. The new Power BI based reports enable consumers to quickly move from aggregated sales metrics at the organization level, to detailed sales transaction level information to answer questions related to weekly sales activity.

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Power BI