



Technology Advisory Case Study for Burris Logistics

Analyzing, selecting, and successfully implementing a technical application that best fits your business and specific user requirements can be daunting, time-consuming, and potentially disruptive for you and your customers.

When faced with this decision, leaders often find themselves asking: How do I know this application is right for my business needs? How referenceable is this application in my industry? Once I implement a solution, how easy is it to scale the requirements as my business evolves?

When Burris Logistics needed to modernize its ERP solution and upgrade its technology suite, they relied on SC&H Group's Technology Advisory team as their trusted partner to serve as an extension of their team to deliver a complete solution.

OBJECTIVES



Assess the current technology environment



Assist in the software selection process



Serve as the Project Management Office (PMO)

“Our systems — warehouse management system, transportation management system — didn't talk to each other. We would extract reports and do manual journal entries into our financial management system.”

Jason James
CORPORATE CONTROLLER
BURRIS LOGISTICS

Background

Burris Logistics (“Burris”) is a family-owned business specializing in various, highly customized supply chain facets, including cold-temperature storage, freight management, distribution, and e-commerce.

Established in 1925, founder John Burris and his father Edward recognized an opportunity while delivering produce from Delaware and Maryland farms to Philadelphia markets. This delivery service instigated their tenure as a cold chain pioneer.

Today, Burris remains a family-led enterprise, operating 16 facilities along the east coast, with locations as far as Oklahoma. Over 2,000 employees represent the company, fulfilling numerous positions within the supply chain logistics organization.

The Problem

Burris was experiencing difficulty upholding quality, efficient business operations as a result of:

- » **FRAGMENTED, INEFFECTIVE ACCOUNTING PRACTICES**
- » **OUTDATED SOFTWARE THAT FREQUENTLY CRASHED**
- » **UNINTEGRATED SYSTEMS THAT DIDN'T COMMUNICATE**

The Burris board of directors and organizational leadership recognized the need to realign business practices and shift processes to a cohesive system. Their objectives were to integrate the operational and management systems, streamline financial functions, migrate information to a cloud database, improve data accessibility, and future-proof their infrastructure and investment.



Strategy

SC&H applies a three-part process to assess, select, and support business systems replacement projects:

1

CONDUCT AN INTERNAL ASSESSMENT AND SET THE FULL ERP PROJECT SCOPE.

- » Complete business analysis to understand current processes and define each department's unique processes outline.
- » Surface areas of opportunity and identify ideal and practical solutions. An involved process that James credits Rossi for conducting personally and thoroughly.

2

IDENTIFY A SYSTEM THAT MEETS THE AFOREMENTIONED NEEDS AND SET PROJECT MILESTONES AND TIMELINES.

- » Provide researched and ideal options for the client to compare.
- » Identify pitfalls, potential timeline disruptions, and provide the client with accurate expectations and budget-conscious insights.
- » Assist with implementation partner selection.

3

SUPPORT IMPLEMENTATION WITH PMO SERVICES.

- » Provide oversight over the internal team and all vendor teams, on behalf of senior management, to ensure that timelines and outcomes are achieved.
- » Identify current and emerging challenges and coordinate resolution with all of the players.

Hurdles

Although seemingly straightforward, interferences — both foreseeable and unforeseeable — are fairly common during implementation. These events demand transparent and timely communication, and can occasionally influence timelines. In this particular instance, three major events materialized during the transition:



ACQUISITION

During the implementation phase, Burris acquired Trinity Logistics. In-house resources and attention was redirected to manage this process; however, SC&H proactively advised Burris that the redirection in-house could lead to a two- or three-month delay in the live software launch. Provided the expectation was set upon learning of the acquisition, there was no time “lost” as a result of the transaction.



FRONTLINE SYSTEM INTERFACING

Although the integrations with the frontline WMS systems were more complex than originally anticipated at the onset, SC&H started work on this right from the start, thus mitigating an arduous extension to the implementation. Burris now has automated interfaces that enable hundreds of thousands of transactions to post correctly.



BANK INTEGRATION

The integration with banks for electronic payments proved to be highly complex as a result of vendor-specific, technical requirements for far more information in the payment stream than is normal. We recognized the challenges this would present and stepped in to help manage the process and ensure the designation of appropriate resources for a successful integration.

Despite these interferences, SC&H seamlessly managed an effective, research backed, and collaborative implementation and recommended the best solution to meet Burris’ intricate needs.

“*Because of SC&H’s candor and expertise, we could tell they had a true understanding of what we needed to do and they were able to make us understand it.*”

Jason James
CORPORATE CONTROLLER
BURRIS LOGISTICS

“We are able to have information readily available a lot sooner. We closed our books quicker. Our audit went a whole lot quicker. We improved efficiency and discipline [...] It’s a true success story; we’re lightyears from where we were.”

Jason James
CORPORATE CONTROLLER
BURRIS LOGISTICS



The Outcome

SC&H evaluated several ERP platforms and recommended the best solution to meet Burris’ financial and technical requirements. Their consolidated solution accelerates operating consistency and efficiency, supports data automation, minimizes manual error, and fuels growth and future scalability as their business demands evolve — all while reducing expenses and a hefty labor price tag.

For Burris, this has resulted in:

- ✔ More definitive and accessible information
- ✔ Efficient inventory management
- ✔ Deeper data analysis and line item insight
- ✔ Streamlined customer reports
- ✔ Clear labor breakdown
- ✔ Faster reconciliation



Why Choose SC&H Group's Technology Advisory Team?

SC&H Group offers finance, technology, and process expertise and experience that cultivates a partnership with an informed and direct approach. SC&H proactively identifies potential issues and accurately assesses stalemates, leading to definitive and manageable timelines with cost-effective, achievable expectations.

With each stage of the implementation, SC&H maintains consistent client communication and provides guidance and insights until the project is launched and live. We bring a dependable, dynamic perspective and unrivaled industry knowledge underpinned by key competencies that match clients with solutions capable of evolving as the company continues to transform.

About SC&H Group

SC&H Group is a nationally recognized management consulting, audit, and tax firm that serves clients ranging from rapidly growing startups to Fortune 500 companies with global brands. The firm's strategic practices provide leading-edge thinking and advice that transform our clients' businesses and help them outpace the competition.

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