

GENLYTE SUPPLY DIVISION ENHANCES REPORTING AND DECISION-MAKING WITH BUSINESS OBJECTS

"With Business Objects, it's now much easier for us to make good solid business decisions based on real facts rather than emotions."
 Jim Lewis, VP of Sales, Genlyte Supply Division



Industry

Commercial,
Residential, and
Industrial Lighting

Business Pain

Genlyte Supply Division antiquated technology inhibited reporting capabilities, resulting in a cumbersome, time-consuming reporting process. Genlyte Supply Division needed fast, in-depth reporting to get an accurate, complete picture of sales and financial performance and the capability to make well-informed business decisions.

Why Business Objects?

Business Objects solutions offer proven BI capabilities, and the ability to scale long-term. In a competitive review, Business Objects stood out with more features, better licensing, and more competitive pricing.

Business Objects Products & Services

- Crystal Reports
- Crystal Enterprise
- BusinessObjects Enterprise XI R2

CHALLENGE

In the world of commercial, residential, and industrial lighting, Genlyte Supply Division shines. With more than 30% new products offered every year and over 300 U.S.-wide sales reps and distributors, Genlyte Supply Division strives to continually exceed customer expectations. Offering innovative lighting products for more than 50 years, the company takes pride in continually meeting industry, customer-specified, and design-engineering standards. Genlyte Supply Division oversees three product brands—Crescent Lighting, Stonco Lighting, and ExcelLine.

Genlyte Supply Division faced a number of reporting challenges, including concerns about accuracy and timeliness. Multiple outdated technologies made reporting complex and time-consuming. Report distribution was difficult and often involved tedious print runs and mailings to sales managers. The Supply Division outsourced its report management but couldn't trust the accuracy of data and analysis. Across the company—from finance to sales to customer service—the Supply Division was challenged to access accurate and timely data to make more profitable, strategic decisions. Spur of the moment, in-depth analysis was virtually impossible. Every month the same issues recurred—labor-intensive reporting processes drained staff resources in every department for weeks, becoming all-consuming at month end.

For finance, information was difficult to extract, resulting in hours of manual data entry and analysis—only to find that numbers didn't agree with other departments' reports. "At monthly staff meetings, when everyone presented their numbers, there would be differences—sometimes big, sometimes small—from the numbers I was presenting, so we were always rechecking numbers," says Helen Ferraro, Director of Finance at the Supply Division. "Even after checking, numbers would still be questioned." The Supply Division had no standardized reports to rely on. "We needed a way to standardize reporting so everyone in the company could work off the same reports and rely on their accuracy," says Ferraro.

In the sales department, it was difficult for sales managers to quickly understand what product, distributor, or program changes would improve profitability, or to get a complete and trustworthy view of sales rep performance. "Reporting for sales reps caused massive confusion across the sales force and diverted their attention from selling," recalls Bill McShane, ExcelLine National Sales Manager. Reporting inefficiencies required the Supply Division's sales team to check numbers continually, causing a lot of reworking of reports and tying up of people's time.

For customer service, reporting issues caused delays in checking or releasing orders from credit hold, or in posting payments to customer accounts. Standing ready to help customers, support staff often found themselves without the information they needed to respond quickly to customer requests for invoices and statements. "When it comes to customers, speed is everything," says Marie Vener, Director of Customer Service at the Supply Division. "But I found myself constantly having to make new requests to IT for reports."

The Supply Division's small but dedicated IT team, composed of a manager and three staff, lacked the IT architecture it needed to serve business users efficiently. Still, rather than constantly juggling repetitive hard-coding, disk space issues, and program maintenance, the team had a vision for IT as a strategic center that could help the company be more profitable. "There were many serious issues with our computing environment," says Bill Perlack, IT Manager. "This situation occurred as a result of years of patchwork efforts using outdated

technological tools and methodologies to try and satisfy business requirements.” The team wrestled with lengthy computer run cycles, juggled job streams that sometimes caused plant and office downtime, and dealt with difficulties rerunning individual reports. Meanwhile, they were acutely aware of the huge amounts of paper required to print and distribute monthly sales reports. These were only a few of the issues that led IT to propose a business intelligence (BI) solution.

APPROACH

Besides the obvious need for faster, more accurate, and in-depth reporting, the Supply Division had several goals. “We knew implementing BI would give us a cost-effective solution, reduce operational and technological inefficiencies, provide a state-of-the-art solution for our business users, and help us keep pace with our competition, without major IT programming efforts,” says Perlack. “We also wanted to reduce our reliance on an outside resource that took care of our sales reporting, and plant the seed for future technological and business improvements.”

First, the Supply Division did its research, assessing several technologies and BI solutions. The Supply Division discounted the others for a variety of reasons— they required hiring a database administrator, they required data conversion, or they weren’t practical or cost-effective. “We also considered a solution from a leading BI solutions provider but it didn’t have the right front-end web access, sub-reports, or licensing we needed—and it was more expensive than Business Objects,” says Perlack.

Having a scalable and flexible solution that could run off the company’s growing data sources was also important. According to Ferraro, “When reviewing BI tools, one of the key issues for our management team was the ability to use the tool we were purchasing with future enterprise resource planning (ERP) systems and data—with Business Objects, we knew we could do that.”

The Supply Division had already seen a glimpse of what Crystal Reports® could do through built-in OEM reporting capabilities in an existing ERP solution. The Supply Division liked what it saw. According to Perlack, “We wanted to leverage our Crystal Reports knowledge rather than being faced with a big learning curve. We selected Crystal Reports and Crystal Enterprise™ because they offer a web-based solution out-of-the-box—giving the users the ability to run their own reports, and providing a robust and flexible report writer.”

At the heart of the Supply Division’s solution is an implementation of data marts on a SQL Server. The Supply Division used Microsoft SQL to build database tables and Microsoft Data Transformation Services (DTS) to load data into the data marts. The result was a data mart for each report discipline—including sales analysis, accounts receivable, sales ranking (ABC) reporting, gross margin, and purchasing. Enhancing data management capabilities, the individual data marts form a central repository against which the Supply Division’s various reports run. “With a central, common repository of information, we don’t need separate jobs or programs to access different databases,” says Perlack. “The central repository results in consistent and accurate data reporting. We’ve reduced our overall run cycles, and it’s easier to react to changes in calculations by making adjustments in a single location.”

Running off the centralized data marts, Crystal Reports provides fast and simple report-writing capabilities. “Crystal Reports is now our standard report design software,” says Perlack. “Our IT department develops reports rapidly by dragging and dropping fields from the data set or stored procedure onto the report.” Reports are then published into Crystal Enterprise. Installed on its own server, Crystal Enterprise facilitates report scheduling and administration, allowing IT to easily maintain servers, report scheduling, users, security, reports, and folders, and giving users the ability to access, view, or schedule reports. Filters control the viewing of information—for example, regional sales managers only see sales related to their territory, but the VP of sales can view sales for all territories.

To assist with solution design, installation, implementation, and training, the Supply Division engaged the services of Business Objects partners CNE and APOS Systems.



Business Objects Partner CNE

A Business Objects partner since 1996, CNE got to work helping Genlyte Supply Division end users and IT, providing the specific industry expertise they needed to get the most from their BI solution. “We could not have installed Crystal Enterprise on our own,” says Perlack. “With the help of CNE, our solution was quickly installed—so we could focus on the overall strategy rather than getting bogged down in technical installation issues.”

Perlack quickly realized the value of working with a partner who had specific industry expertise. When it came to the new BI solution, CNE provided a range of services—from software installation and upgrades, to solution configuration, to onsite and online training. CNE also provided consulting on advanced reporting techniques to help the company make reporting as efficient as possible.

“CNE consultants are very knowledgeable technically. They know Crystal Reports and Crystal Enterprise—and they helped shape some of our decisions regarding report design and how to use business views,” says Perlack. “CNE’s breadth of business knowledge also enabled us to discuss alternatives regarding the best way to meet business requirements, and helped us identify opportunities to match software to our needs.”

The relationship hasn’t ended there. The two companies have an ongoing dialogue about additional ways to improve information analysis and access. For CNE, a Business Objects partnership has been a great opportunity to work with Genlyte Supply Division. “We see tremendous potential to help Genlyte Supply Division to be even more profitable in the future,” says Herb Hess, senior consultant at CNE.



Business Objects Partner APOS Systems

Genlyte Supply Division also worked with Business Objects technology partner and BI consultancy, APOS Systems. Recognized as the Business Objects 2006 Partner of the Year, APOS Systems has helped many companies like Genlyte Supply Division. With expertise in building applications that mesh with Business Objects technology to meet specific needs, APOS Systems helped the Supply Division implement the APOS Systems Bursting Manager for report delivery to sales reps. “APOS is a valued partner,” says Perlack. “We selected the APOS Systems Bursting Manager because of its simple setup and administration. With their technical help, we were able to quickly deploy the solution.” The APOS application integrates with Crystal Enterprise to push out data in bursts, or mini-reports, from one original sales performance report.

RESULTS

Getting reports out to the sales, finance, and customer service staff who need them has never been easier. Now everyone in the company is working with the same data. “By standardizing on Business Objects, we could move forward with a common approach to sales reporting,” says Ferraro. “That allowed the sales group to be able to present numbers without me questioning them every month. This took a lot of pressure off everyone. Also, previously sales reps received two different reports, which often showed conflicting numbers. Now, with Business Objects, reps receive one accurate report and all numbers are in synch.”

The company also has reduced manual reporting efforts, distributing reports to sales reps via the intranet. Reports for sales reps are distributed via the APOS Systems Bursting Manager, and published on the company’s intranet for easy viewing. Users access the system to view reports, download report details, print reports, and even schedule their own reports using parameter values. Managers can run a sales report for a specific product line for a specific region or sales rep. “There’s lots of flexibility now,” says Perlack. “We eliminated the need for sales managers to create multiple Excel files and then email them out manually to each sales rep. Implementing the APOS Systems Bursting Manager has eliminated about 30 hours of manual effort at month end.”

With reports working efficiently in-house, Genlyte Supply Division no longer needs to outsource reporting. According to Ferraro, "We've stopped using the outside consulting resource—saving up to 10% in total consulting costs."

IT is also more efficient. The Supply Division's automated reporting requires less IT programming, less administration, fewer printed reports, and reduced report run times. "IT benefits because we deploy reports faster and take advantage of more modern tools to service our user communities. The whole organization benefits because run times have been drastically reduced," says Perlack. For example, instead of taking 18 hours to run month-end accounts receivable reports, the effort now requires only three hours.

Other efficiencies include the capability of sales, finance, and customer service to drill down by distributor, product family, or even by part number to look at profitability and how to improve it. "To get key data a year ago would have been next to impossible without sitting down and spending hours marrying different reports together. Now, with Crystal Reports, we have what we need in about 30 minutes," says Jim Lewis, VP of Crescent/Stonco Sales at Genlyte Supply Division. In addition to more accurate data, company leaders make more accurate decisions, faster. "Our reporting solution moved from being a reporting tool that was looked at once a month to being a decision-making tool that's used on a daily and weekly basis," says Ferraro. "And it's really evolved. We're able to see where our regional managers and sales reps are effective, and we can direct and put more focus on products and programs when and where it's required."

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Genlyte Supply Division plans to enhance information access with interactive dashboards that closely monitor key performance indicators. Still in the investigation stage, the company is considering several additional Business Objects products.

About Business Objects

Business Objects is the world's leading BI software company. With more than 42,000 customers worldwide, Business Objects has also built the industry's strongest and most diverse partner community, with over 3,500 partners worldwide. Business Objects helps organizations gain better insight into their business, improve decision-making, and optimize enterprise performance. For more information, visit <http://www.businessobjects.com>.

About CNE

CNE is a Gold Business Objects partner and helps businesses improve performance with Business Intelligence. CNE consultants are certified to work with Business Objects products. Services offered include analysis and implementation; report design and creation, end-user training, IT training, cube design, and solutions for front-end web development. For more information, visit www.cne.com.

About APOS Systems

Since 1992, the corporate philosophy of APOS Systems has been to help clients solve problems with personalized care. A full service Crystal Partner since 1996, and the 2006 Business Objects Partner of the Year, APOS Systems offers in-depth expertise with Business Objects products. For more information, visit www.apos.com

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