



Central Sales Limited

Smart use of a Datamart eliminates information deficit

The Company

Central Sales Limited is a Brampton, Ontario based distributor of veterinary pharmaceuticals and supplies. A team of direct sales professionals promotes products across Canada, with invoicing handled either directly or through regional buying groups.

The Situation

The buying groups handled their own invoicing and distribution to the end users, and they provided monthly sales data to Central Sales. But with no way to compile and present the data, Central Sales had a serious information deficit. Detailed sales information was not readily available about product distribution, so sales professionals had no idea what the clients in their territories were purchasing. They didn't know where to focus their sales activities.

"It used to take me three or four days per month to get the reports ready; now I'm done in a few hours"
-Gracinda Borges, Controller

The lack of accessible information was an operational problem for sales staff, but it also posed a strategic problem for management. Any forecasting or sales projections required manually compiling data into Excel worksheets, consuming hours and hours of staff time. This was far from an ideal situation!

The Results

As a result of implementing the new reporting infrastructure, Central Sales can now provide its sales staff with accurate, timely information about customer purchases before they go on sales call. Reps are now armed with information about customer buying patterns that allow them to present the right offers to clients, resulting in increased sales. In addition, access to historic data has made it much easier to introduce new sales reps, who can very quickly get up to speed on the needs and patterns of their clientbase.

What's Next?

The Sales Datamart and Analysis Reports have been a very informative first step into Business Intelligence for Central Sales, providing greater understanding of the needs of individual customers and the performance of Sales Reps. So where does Central Sales go now in terms of improved Customer Knowledge?

Recently, Central Sales has started implementing Crystal Xcelsius for visualization of sales data and Dashboarding. Used in conjunction with Crystal Reports and the existing Datamart, Xcelsius will provide an interactive, comprehensive view of all Central Sales' Customer information, and by being more knowledgeable about its customers, Central Sales will be better equipped to grow its business.

The Remedy

Central Sales enlisted the help of Dynamic Intelligence to find a way to get useful information into the hands of their management and sales staff.

Using Microsoft SQL Server Data Transformation Services, source data files from each buying group were 'cleaned', organized and stored in a reporting database, as was transactional data from Central Sales' Microsoft Great Plains system. The database is optimized for accessibility and reporting speed.

Data serves no purpose until you can look at it, and to do this Central Sales chose Business Objects Crystal Reports. Central already had a variety of Sales reports in place, so using Crystal was a logical choice. In this case, Crystal serves a variety of purposes:

- ▶ Detailed sales reports for individual sales reps. Now the sales reps can view detailed sales information by customers, items or vendors.
- ▶ Management Reports providing insight into the activity of each buying group, sales rep or product line.
- ▶ Data validation – As new clinics are added by buying groups, they need to be assigned to salespeople and territories. Crystal identifies new records to streamline this process.
- ▶ Data extraction – Some of the sales reps wanted the flexibility of manipulating the data in their own way. No problem! Using Crystal, selected data fields are made available to sales reps in a Microsoft Excel format.