

Solver Data Warehouse Streamlines Reporting and Budgeting for Distribution Management Company

Distribution Management provides operational infrastructure for its subsidiary companies, specializing in automated order handling, fulfillment and shipping of small packaged goods. As the company grew through acquisitions, their financial processes became increasingly fragmented and inefficient.



INDUSTRY
Distribution

ERP
Microsoft Dynamics SL

“ Solver has been the easiest and most gratifying implementation experience of all. We’ve graduated from numerous offline Excel files to a centralized and consistent repository of results and reports. ”

—Eric Sliger, Director of Financial Planning and Analysis

THE CHALLENGE

The team faced significant challenges with version control and lacked the ability to quickly assess changes in planning and forecasting drivers. One-off, pieced together processes were simply not efficient or dynamic enough to support decision-makers with accessible reports, budgets, and forecasts across their subsidiaries.



THE SOLUTION

Distribution Management selected Solver to better manage their growing amounts of data across the company. The implementation was smooth thanks to strategic partnerships with both Solver and their reseller partner, Tribridge.

“I have experience with other software platforms, having implemented solutions like SAP’s BPC and Longview’s Khalix,” Sliger says. “Without question, this has been the easiest and most gratifying experience of all.”

The company leveraged the full suite of Solver features to support both financial and operational performance reviews. They successfully integrated their financials into Solver and incorporated statistical measures within this data structure to include high-level operating metrics.



A standout feature for Distribution Management was the ability to create and add dimensional attributes to their chart of accounts and cost center structures. “Leveraging this feature, we are able to consistently analyze the financial and operational results of the business in many different ways that before required managing several different relational tables across several different Excel files throughout the company,” Sliger explains.

THE RESULTS

Implementing Solver made a big impact in both obvious and subtle ways for Distribution Management. The company now uses Solver exclusively for reporting financial statements, including Income Statements and Balance Sheets, as well as segment reports for subsidiary companies.



“The quality of our budget has increased significantly,” Sliger says. “Collaborative use of budgeting templates has resulted in consistency across departments with regard to supporting entries, notes and numbers. We are able to consolidate, review and revise departmental budgets in a way previously not possible.” The benefits extended beyond traditional technological improvements. By utilizing the Scenario dimension in Solver, Distribution Management created alternate views of business performance with allocations that weren’t possible before. This resulted in a higher degree of accountability to budgets, with teams no longer saying “That’s your number, not ours.”

SUMMARY

Solver has introduced collaborative planning tools, real-time budgeting and forecasting reports, and more meaningful interactions with business leaders. The solution has challenged Distribution Management to explore new ways to examine their business performance.

The company plans to continue adding more diversified data to the Solver Data Warehouse, including integration of their existing data warehouse to leverage the platform holistically across products, pricing and operational aspects. This will allow them to accomplish their robust analytical objectives and continue to lead in their industry.

