

SQL Server 2005 Business Intelligence (BI) tools allow Lentz Milling Company to turbo charge its operations.



Solution Overview

Customer Profile

The Lentz Milling Company, located in eastern Pennsylvania, is a regional distributor of a wide variety of bakery ingredients, frozen baked goods, ready-to-bake pastries, bread doughs, fillings, flavorings, mixes, and spices.

Business Situation

The effort to massage flat data files using traditional database/spreadsheet tools was time consuming, needed to be recreated each period, and was not robust to get at performance drivers. The resulting ad-hoc reports were several weeks old by the time target users received them.

Solution

With assistance from Weidenhammer Systems Corporation, Lentz Milling implemented BI solutions using tools that are integrated within their SQL Server 2005 product.

Benefits

- Identify opportunities for revenue growth/cost reduction
- Measure profitability by customer segment, customer, and geography
- Track results from sales initiatives
- Provide KPI data
- Provide web-enabled access of reports
- And much more...

Lentz Milling was faced with the same problems facing many other small-midsize businesses (SMB's) with databases or disparate data sources that contain a wealth of information that cannot be properly mined with traditional spreadsheets/database programs. Confronted with the need for more advanced data-driven decision making, they turned to Weidenhammer for the solution.

Challenge

Prior to BI, I would have to request that our IT programmer create extract routines to export data from our legacy system in a delimited file format. I would then have to cleanse that data in Excel and load it into a homegrown Access database. I would spend 4-5 hours each month just processing data before I could begin to analyze the data. Now I have instant access to the data I need and can shift my time from data preparation to data analysis and action planning.

It was also very cumbersome to provide other executives and managers access to my homegrown database. I was the only person in the organization who knew how to use Access and I was the only person who had a license for the software. I had to manually export data from Access, format it into an Excel pivot table, and then provide it to the end user who needed it. To make matters more challenging, the end user had to be facile with Excel pivot tables to be able to make use of the data, which created a barrier for most end users to effectively use the data. – Ted Lentz, President, Lentz Milling

The challenge then was how to obtain information to make educated business decisions with a clear understanding of growth / sales / profitability of Lentz's customer base by customer segment and geography. Lentz needed the ability to identify the key indicators that drive company performance in all areas of the company and to establish a measurement-oriented approach to managing the business. Lentz also wanted greater visibility into sales representative's selling activity to hold the sales representatives accountable for achieving their personal goals and targets.

Solution

Lentz Milling contracted Weidenhammer Systems Corporation to assist in the deployment of their first foray into Business Intelligence using SQL Server 2005. The Weidenhammer team worked with Lentz's President, Ted Lentz, Information Systems Manager, Faye Miller, and network administrator, Ed Himmelberger, to understand their data and analysis/reporting needs for sales strategy in revenue, gross profit, quantity, product pack size and order information.

Weidenhammer consultants configured a SQL Server 2005 server, built a data warehouse, created ETL (extract, transform, load) processes against raw, transactional data, built two OLAP (Online Analytic Processing) data cubes for ad hoc analysis, and deployed nine Analytic Perspectives (AP's), which are on-demand, three-dimensional, user- driven analysis summaries and reports.

With this solution, Lentz's Executives, Regional Sales Managers, Territory Sales Representatives, and Pricing Analysts select rich, AP's that produce summaries exactly the way they need to make strategic business decisions. The table below shows some of the AP's Lentz personnel may choose from:

BI SUMMARIES	ANALYTIC PERSPECTIVES TO CHOOSE FROM
Vendor Item Categories	Vendors, product categories, customer types, sales metrics, sales territories and month/year
Customer Profile	Customer, stock status, product category, item code, and month/year
Cross Sell Account	Vendor, stock status, product category, item code, holiday, sales metric, sales territories and month/year
Sales Territory Summary	Customer type, sales territories and month/year
New Account Detail	Sales territories and month/year
Daily Sales Journal	Customer type, customer, sales territories and start and end dates

In addition, Ted Lentz extensively utilizes the ad hoc power of the analytic cubes that Weidenhammer engineers built. He utilizes the power of SQL Server Management Studio as well as the Excel Pivot Tables imported via Excel's built-in connection to SQL Server Analysis Services cubes.

Deliverables

- Lentz Analytic Perspective Report Design Specification
- Lentz Analytic Perspective Report Mock-ups
- Scope Definition, Project Plan and Schedule
- Outstanding Issues and Bug Reporting Procedures
- Lentz Data Warehouse
- Nine Analytic Perspectives
- Two OLAP Data Cubes
- Training and Knowledge Transfer
- Lentz Milling Data Warehouse ETL Procedures



BI tools help us to make better decisions with actual data and not just 'gut instinct' or 'experience'. It enables us to apply the 80/20 rule more effectively in managing our business by quickly zeroing in on the biggest opportunities to improve operating results.

– Ted Lentz, President, on why the SQL BI tools function as their Magic 8-Ball



How LENTZ Benefits Today from the Solution

End users have access to a set of interactive, Analytic Perspectives using a web browser. These AP's utilize simple filters that allow the end user to customize their analysis and return the specific information they need to assist their decision-making or performance management process. They can easily export this data into an Excel-ready format for further analysis or distribute via email to other Lentz management team members.

For more advanced analyses and complex business questions, 'power users' can utilize Excel's pivot table capabilities to connect directly to the SQL database as a data source, or build pivot tables within SQL Server Management Studio.

The SQL Server BI solution enriches Lentz's ability to identify its business drivers by adding many new dimensions to their monthly data set, therefore creating opportunities to generate new kinds of analyses. Some recent uses and benefits of this multidimensional analytic capability include:

- Rapidly prioritizing opportunities within each sales territory to grow existing customer relationships
- Creating a "same store sales" index to monitor how general economic conditions are impacting their customer base
- Measuring the impact that changes in credit policies had on customer sales
- Identifying customers who consistently failed to meet minimum order sizes
- Tracking and driving the growth of newly introduced products

Products Utilized

Microsoft SQL Server 2005 BI components:

- SQL Server Integration Services (SSIS)
- SQL Server Analytic Services (SSAS)
- SQL Server Reporting Services (SSRS)
- SQL Server Management Studio (SSMS)

Microsoft Office components:

- Excel



Prior to implementing SQL, I had to rely on paper reports for basic information about how our business was performing. These reports would show the top-line trends but could not provide any insight into the specific drivers of the observed performance. – Ted Lentz, President, on the main advantage of SQL Server 2005 Business Intelligence



For More Information

For more information about Weidenhammer products and services, call Weidenhammer Sales at (866) 497-2227. To access information using the World Wide Web, go to www.hammer.net

For more information about Lentz Milling, go to www.lentzmilling.com

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