

From Reporting to Analytics:

5 Eye-Opening Examples of How
Business Intelligence Fuels Profitable Change



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There comes a time for every growing business when reporting alone can't provide the deeper insight needed to make decisions that build a better future. Basic reporting is essential – providing the building blocks to measure financial results, monitor transactions and track the resources of the business. But in order to analyze relationships and track down the not-so-obvious patterns that affect your business, you need something more than reporting alone.

The journey from reporting to business intelligence (BI) is an evolution. As your business grows, reports raise questions about underlying causes that are no longer simple to track down. BI empowers users to find correlations, patterns and outliers. As your organization matures, BI provides new perspectives that can fine tune operations and uncover new opportunities – to fuel profitable change.

The right information can allow your managers to see through the details to uncover causes and effects that they were not expecting. The examples we've included in this white paper represent just a fraction of the experiences that real businesses experience when they move from reporting to business intelligence. We hope these examples help you envision the possibilities in your own company.



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The Manufacturer's Sales Team

Citing tight profit margins in their new product line, the CFO of a beverage manufacturer instituted strict limits on discounts. The sales team was livid. Creating barriers to their relationships with customers was a huge step back. To compete effectively, they needed flexibility to negotiate with customers based on account profitability, not specific products. The loss of a key account proved the sales team right.

The solution came through a BI initiative that empowered the sales team with information. With access to combined information for all costs associated with an order, from margin to promotional costs, salespeople had complete information to negotiate profitable deals that benefited both parties.

Build relationships with your customers through BI

Use data strategically to work in partnership with your customers and distributors. Manufacturers can sell more products and build customer loyalty with BI that:

- Optimizes product mixes and seasonal inventory.
- Provides the information to price and promote strategically.
- Arms sales teams with actionable information for negotiation.



The Distributor's Forecast

There was a time when the sporting goods business was pretty straightforward – stocking baseball equipment in the spring and footballs in the fall. Now, the fast-paced business requires near split-second timing to keep up with the hottest trends. Which was the problem a sporting goods distributor was facing. Overstocks from last month's hot products were drowning the company in red ink.

Through a move from reporting to business intelligence, the sporting goods distributor tapped marketing data to track regional and online buying trends. Data on seasonal sales and retailer purchases are combined to further refine the forecasting and stocking decisions for the company.

Respond to change quickly with BI

When you can look up and down the supply chain, turning data into predictive information, you can make faster decisions. Distributors can also use BI to:

- Reduce overstocks with better forecasting.
- Work closely with retailers to build demand through well-timed promotions.
- Proactively work with manufacturers to optimize purchasing.



The Retailer's Big Store Mystery

The disparity in year-over-year growth between stores of a retail chain was growing. Sales at larger footprint stores were lagging, especially in high-margin items. While there was lots of speculation, there was no comprehensive set of data that could deliver the analysis needed. Management decided to implement a BI solution to learn the truth.

Through analysis of sales and employee data, they found a surprising correlation. The larger footprint stores had a far higher percentage of part time workers. The retailer had a policy that only full time workers received formalized sales training, including upsell techniques. The policy was changed and now part-timers know how to position higher-margin products with customers.

Uncover correlations with BI

Policies and processes can lead to unexpected and difficult-to-uncover results. BI allows you to look at issues from different angles to find solutions. Retailers also use BI to:

- Optimize inventory across stores and warehouses.
- Analyze online purchase trends to predict in-store sales.
- Spot customer trends to predict future behavior and proactively promote products.



The Service Company's Expansion Plans

A multi-discipline engineering services company wanted to expand into a new region. Taking a measured approach, they would offer the most profitable services first and add the rest over time. The confusion started when they found that the calculations of profitability for each discipline was computed differently. Each group treated overhead and shared service costs differently.

Through a BI implementation, the engineering company was able to collect data from across systems and standardize the calculations. With one version of the truth, profitability of each discipline could be compared to get their expansion plans started on the right foot.

One version of the truth with BI

Service companies face unique challenges, tracking the profitability of teams and projects at many levels. With true BI, your service company can:

- Bid on jobs with confidence in project profit projections.
- Deliver real-time actual costs and budget information to project managers.
- Identify best practices from high-achieving groups to apply throughout the company.



The Software Company's Renewal Surprise

While 85% of customers renewed their support agreement after the first year, a software development company couldn't seem to make progress with customers whose agreements had expired. The customers were still using the products, had no complaints, but ignored all attempts to get them to renew their service contracts.

After implementation of a BI solution, the sales department took a deep dive on the renewal data. The relationship that they uncovered changed their marketing approach. Of those customers that renewed their service agreement at the end of the first year, 95% of them signed up again at the end of the second year.

The importance of demonstrating the value of first year renewal became apparent. Marketing focused on keeping customers on support rather than trying to convince lapsed customers to come back.



Understand customer behavior with BI

Everyone makes assumptions based on what they think they know. BI allows your organization to challenge old ideas and find new ways to profit. Software companies use BI to:

- Understand actual costs of development.
- Analyze customer requests to influence product roadmaps.
- Monitor service data to ensure responsiveness to customers.

The Journey from Reporting to BI

Reporting is the first step on the journey to business intelligence. Reports prompt questions that compel users to look for relationships and explore trends. BI is the natural progression, empowering users to find answers that will improve operations and uncover new opportunities – fueling profitable change.

Every business is unique, and BI will allow you to look at all aspects of your operations with renewed perspective. The examples we've shared are meant to help you imagine what BI can do for your company to:

- Build stronger customer relationships.
- Respond to change more effectively.
- Provide new perspectives on correlations and patterns.
- Deliver one version of the truth.
- Provide a greater understanding of your customers.

At Jet Reports, we've helped thousands of organizations make the journey from reporting to business intelligence. Let us know when you are ready to get started.

Jet Enterprise – A Complete Business Intelligence Solution

Business Intelligence and Reporting Built for Microsoft Dynamics

Jet Enterprise is a complete BI and reporting solution that provides the answers to your mission critical questions inside Excel, the application that you already know. With little or no training you can quickly analyze issues from many different perspectives to discover trends in your business. Jet Enterprise builds the value of your Microsoft Dynamics ERP to deliver even greater insights. We deliver:

- Proven solutions – used by over 60,000 users worldwide.
- Support you can rely on – renowned customer service across 24 time zones.
- Empowered users – training to match every learning style.

Immediate ROI

Jet Enterprise can be implemented in just hours, so you gain valuable insight into your business almost immediately. There is no need for expensive technical resources to maintain or modify your BI tool, and there is no load on your ERP system.

See how easy BI can be

Explore the possibilities. We invite you watch the 2-minute video “[Business Intelligence and Intuitive Reporting](#)” to see how Jet Reports can take you from reporting to BI.

Ready to take your business to the next level? Contact the Jet Reports Team at sales.us@jetreports.com or 503-608-3602.



Jet Enterprise