

# MUTUAL

DISTRIBUTING COMPANY

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6.2

## Streamlined Dashboard Development for Effective Supply Chain Management

Having spent more than a decade working in IBM’s Advanced Technology Group prior to his transition to an executive Information Technology role in the distribution industry, Jim Staton, Mutual Distributing Company’s Vice President of Information Technology was looking to improve supply chain efficiency through the application of a business intelligence platform. Staton recalls, “I had looked at Cognos and then ended up choosing Dimensional Insight’s BI tool, Diver, because I could see that it was going to be less expensive from a cost of ownership perspective and easier to implement. We had a very small IT group at the time and I wanted to empower management with the ability to create their own reports - something that could be readily accomplished using Diver.”

Mutual’s use of Diver has evolved over the past nine years. Initially the product was used for ad hoc sales analysis to see product movement and volumetric-based brand performance. Diver is now used at an enterprise-level with applications developed for inventory, supplier reporting, and financials as well as sales. The release of The Diver Solution™ version 6.2 triggered a revolutionary change in both BI application and usage at Mutual. With the new version focusing on the development of dashboard environments and web-based analytics to support the concept of pervasive BI, Staton and Mutual’s Network Specialist, James Batchelor developed a dashboard initiative for Mutual’s branch managers and began the task of migrating Mutual’s business reporting infrastructure from an earlier version of Diver to take advantage of this new functionality. ▶

### Insight at-a-glance

#### Industry

Wine, Beer & Non-alcoholic Beverage Distribution

Customer Since - 2000

Employees - 700

#### Company Description

Mutual Distributing Company is North Carolina’s largest beer and wine distributor with 700 employees and 9 offices located throughout the state. A privately owned distributor founded in 1946, Mutual strives to be an industry leader in warehousing and delivery options through its ongoing investments in automation and information technology. Mutual Distributing offers its customers a portfolio of over 1200 brands, sourced by 300 suppliers.

#### Headquarters

Raleigh, NC

#### Website

[www.mutualdistributing.com](http://www.mutualdistributing.com)

### Information Delivery Goals:

Make information visually intuitive and easy to understand

Migrate from primarily tabular information displays to graphical indicators and dashboard views

Make suppliers and sales team members an integral part of the dashboard definition process to support user adoption and streamline roll-out

### Key Benefits

Provide BI capabilities to branch managers in a familiar, web-based environment

Empower key users with access to actionable information on sales performance via dashboards

Sales personnel has the ability to easily view their performance against corporate goals and investigate detail data behind key metrics



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- Jim Staton, Vice President, Information Technology

The first order of business for Mutual was to interview key users to understand their priorities and the decision-making process. Staton and Batchelor then prioritized this information to begin mapping out the creation of several dashboards to provide branch managers with sales goals, quotas and targets for cases, dollars, and product. Staton describes the benefits of providing users with dashboards in version 6.2, “We’re simplifying the decision-making process because we are delivering information and focusing a user’s attention in such a way that action can be taken immediately. In some sense I see this as being a tool that provides management direction to our employees. It allows everyone to be on the same page. We will no longer run into a situation where one manager does their analysis one way and another manager is doing their analysis differently. It helps us communicate more effectively because the conversation starts at the same place.”

Prior to using version 6.2, Mutual had been presenting information to users in tabular format and had not infused each of the developed applications with graphical representations of the data. In addition, many of Mutual’s users, were performing the same analytical tasks on a repeated basis to extract the subsets of information they needed. One of the goals of Mutual’s dashboard initiative was to eliminate the time users were spending on repetitive analysis and to begin distilling that information for them automatically within a dashboard view. “This new version allows us to put together views of the data that are more actionable,” says Staton. “We can now easily display the result that we want the user to see as opposed

to providing the user with several report views that contain the various pieces of that information. Being able to display information that instantly leads the user to a conclusion is very powerful.”

Feedback from branch managers on being able to access critical goal and quota data via web-based dashboards has been exceedingly positive. “When I showed the users what we had been working on in version 6.2 they were really excited about the ability to quickly access key metrics without the need to dig around or perform additional analysis,” explains Batchelor, Mutual’s Network Specialist responsible for the deployment of the project. “Our users essentially perform four or five analytical tasks involving Diver every day, so we’re trying to capture those tasks and make it easy for them to just open a browser, log-in to the product and see those items automatically. It’s going to save time but an added benefit is the ease-of use; there’s really no learning curve involved for new users.”

Asked whether the new version will be a time-saver for him, Batchelor answers, “The interface is so intuitive that I’m going to be spending a lot less time with users doing individual coaching. This new version will most likely create a situation where my responsibilities will shift to supporting users with the creation of different types of dashboards that house role-specific information.” Version 6.2 creates a flexible environment for administrators to quickly design and deliver role-specific data in a dashboard view. New indicator types have been created and combined with new administrative features such as drag-and-drop placement of page items

and re-designed navigation structures to streamline the dashboard development process. Through 6.2’s one-click command center, administrators can customize the options available to users for each dashboard item, such as invoking Diver’s advanced analytical clients, exporting to one of several supported file formats or drilling down further into the current data view. “This is going to change the visibility level of our entire implementation,” says Batchelor. “In the previous version a user might have had access to several dozen different data views. Now they will be able to quickly peruse these items in a consolidated view, within a dashboard. Our users are going to start thinking differently about the information they have access to after being able to see it presented in this way.”

Suppliers also have access to a subset of Mutual’s data via Dimensional Insight’s integrated web portal, DivePort. Suppliers can log-in to DivePort to view shipments and stock levels for each of their products. Staton is eager to begin adding more information to Mutual’s existing supplier reporting portal and transition currently available views to dashboard-centric views. “By providing access to inventory and sales forecast data, our suppliers will have a better understanding of the number of days Mutual is keeping their product on the floor – a key piece of data to effectively manage the supply chain,” Staton explains. Staton also plans to provide Mutual’s intended future pricing to suppliers along with upcoming promotions and discounts for each brand. The intent is to utilize BI technology to solidify Mutual’s relationship with their suppliers and simultaneously enhance profitability for both parties.



DATA → INFORMATION → ACTION

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