



Case Study:
LIPMAN BROTHERS

Empowering A Sales Organization
with Role-Based Dashboards and
Self-Service Reporting

“With the Diver Platform we are providing customized sales performance dashboards to our users. I was able to get automatic buy-in from even my most skeptical users because I could customize it to their unique needs in advance.”

Luci Cain, Sales Technology Coordinator, Lipman

Quick Facts: **Organization:** Lipman Brothers
Location: Nashville, TN
Established: 1939
Industry: Beverage Alcohol

Employees: 200
Customer since: 2000
Solution: Diver® Platform
Website: lipmanbrothers.com

The information required to effectively manage the sales operations surrounding 2,000 of the most widely recognized brands in the beverage alcohol market is no small task. Lipman Brothers, Inc. (Lipman) addressed this challenge nearly a decade ago by partnering with Dimensional Insight® to implement its business intelligence (BI) solution, Diver Platform (Diver), capable of supporting the reporting and information delivery needs of a growing enterprise. Luci Cain, Sales Technology Coordinator, who has been intimately involved in the BI initiative at Lipman since its inception, says, “We used to have trouble pulling together the different aspects of our business into reports. When we first started using Diver, our goal was to provide our users with better access to information by giving them the ability to navigate through sales and inventory data on their own to get the answers they needed.”

Over the past decade the BI needs at Lipman had evolved and become more sophisticated in order to keep up with the constant influx of requests generated by members of the sales organization. While each member of Lipman’s sales organization was able to access data on monthly sales volumes and goals, a significant amount of time was still being spent by several sales administrators supporting the specific information requests of Lipman’s sales management team.

“We were providing our users with web-based and email access to reports on sales for the month, what brands were being shipped to which accounts, or data on how each of our brands or divisions were performing, yet our users were still spending a lot of time customizing their view of the information or sifting through the data to retrieve a specific number,” says Cain. “Now we are automatically providing that information to them.”

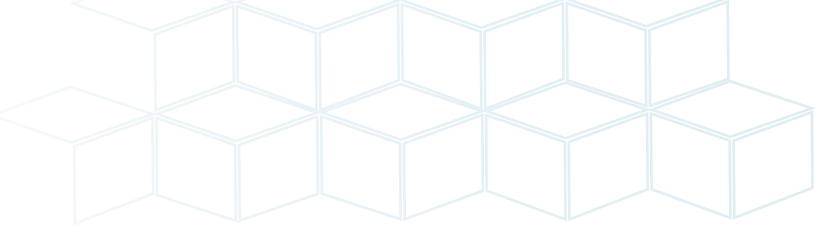
The vision at Lipman was to transition members of the sales organization from multiple report views in various formats to a single dashboard view reflecting data on sales incentives, volumes, and goals for each individual.

Users have the ability to quickly filter information by customer, brand, supplier or other key dimensions to reveal detailed insight on the data presented, instantaneously.

One crucial component of the plan was to ensure that the information in each dashboard had the ability to roll up to a more consolidated view for high level managers, allowing for streamlined communication and rapid decision-making. This vision became a reality with Diver. “[Diver] has made it much easier for our sales organization to see how they are performing, what needs to be improved upon, and where the opportunities are for that improvement—and it’s all instantly available.

Our managers aren’t going to have to continually request reports in search of a few numbers because we’ve made it available to them via dashboards. Information is now truly at their fingertips,” explains Cain. “Our users are excited about how much information they now have access to and how easy it is to find what they are looking for.”

Diver has provided Lipman with considerable flexibility for their dashboard and self-service reporting initiative. It focuses on providing complete flexibility over page layout, the ability to access detail data directly from dashboard views and incorporates redesigned dialogues to ease set-up and maintenance for deployments that involve multiple, customized dashboards for different users. “One of our challenges stemmed from the fact that it was clear that everyone wanted to view information in their own way and nobody wanted to look at the same thing,” says Cain. “[Diver] gave us the flexibility to roll out customized dashboards and, in turn, is giving our sales managers the flexibility they need to manage their people and their business the way they want to. [Diver] doesn’t force us to provide information to our users in a certain way and it’s allowing us to be more productive as a result.”



“Once they [users] saw the new user interface and how easy it was to view information and delve deeper to investigate any data item from the top-level down to the detail-level they were not only wowed, but sold.”

Luci Cain, Sales Technology Coordinator, Lipman

One of the most tangible benefits associated with Diver is reducing ‘time-to-information’ for Lipman’s key users, from their COO down to individual market managers. “Our users were getting the information they needed, but not always in a time-frame that best suited their needs. By giving our users timely access to data, they can grow their business and communicate better with their accounts. It’s helping us make better decisions and it’s allowing us to focus on areas that require attention,” explains Cain. Enhanced data visualization options have been incorporated into Diver that facilitate the creation of performance dashboard views that pair graphical indicators with contextual information that guide users in the decision-making process. Users are instantly alerted to areas of concern and then have the ability to ‘dive’ into detailed information directly from the main dashboard page to see supporting information on sales incentives, specific accounts, inventory or any other number of key areas. The ability to access the information on the fly without requesting additional reports from Lipman sales administrators allows users to quickly obtain the information they need.

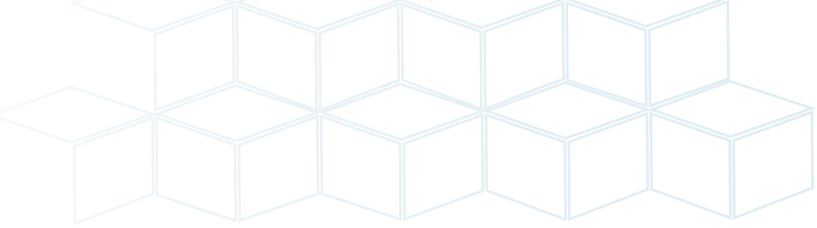
Lipman is already making plans for the next phase of their enterprise BI initiative. “We plan on providing even richer information to the existing dashboards we’ve created by bringing in more inventory-based data,” says Cain. In the next twelve months Lipman will also provide data to other parts of their supply chain by giving suppliers access to key data elements in a dashboard view. Cain concludes, “You can easily see that [Diver] was designed to support the creation of dashboards and scorecards. It allows us to put many smaller subsets of information together in a single view, which prevents our users from looking at many pages within a portal environment or navigating through multiple reports to extract the information they need to do their job. The time savings is measurable — users now have a high level view of critical data and we can easily direct their attention to areas that need it.”

INFORMATION DELIVERY GOALS:

- Create role-based dashboards for three different types of sales managers.
- Provide executives with a holistic view of sales operations at a summary level with access to relevant detail.
- Provide users with improved access to sales goals and incentive information in a timely manner.
- Customize sales performance dashboard views based on user preferences.
- Establish a self-service reporting environment to support ad hoc requests.

KEY BENEFITS:

- Significantly reduce ‘time-to-information’ by providing instant access to sales volumes, account-level detail, inventory, and monthly sales incentives by supplier or brand.
- Enhance data visualization options.
- Improve user adoption.
- Flexible administrative features allow consolidated data views to be customized and rolled up based on Lipman’s organizational structure.
- Improve maintenance and administration of web-based data views allowing managers to focus on trends within the account, brand, or division level.



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