



A CASE STUDY

“Powder” BI

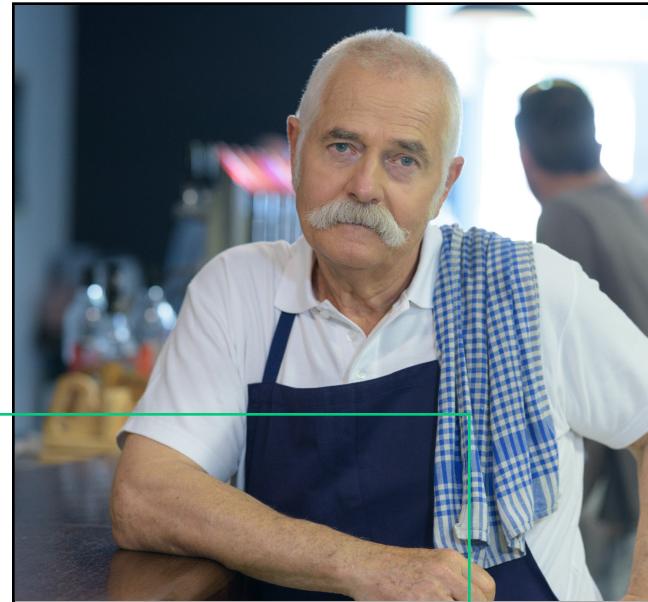
How Bar Keepers Friend
Scrubbed Its Data to Adapt
to COVID-19

“How do I clean the handrails in my bar?

It may sound like a Google search from a post-pandemic publican, but it was also the inspiration behind a cleaning product 130-plus years in the making.

Bar Keepers Friend, the oxalic acid-based powdered cleanser, took tavern owners by storm after its accidental discovery in 1882, when a chemist's cooked rhubarb yielded a sparkling pot. Yet it was no accident how SerVaas Labs, the product's current manufacturer, turned it into a world-renowned brand.

The Indianapolis-based company acquired Bar Keepers Friend after World War II. Since then, SerVaas has expanded in both offerings and distribution, with an array of multipurpose residential and institutional cleaning products sold in over 30 countries, all with the motivation of solving problems for its customers. So while bars, restaurants, retailers and grocery stores have recently faced some of their largest problems ever in learning how to adapt their businesses in the face of COVID-19, SerVaas Labs overcame its own hurdles to help customers stay clean and stocked.



Bartender, Therapist, Custodian

In pandemic times or not, manufacturers of SerVaas' size must be lean to survive. For the SerVaas team, that means having all of its functions, from corporate to manufacturing and packaging, in the same facility to keep costs to a minimum. It also means all members of the roughly 40-person team need to wear lots of hats.

Matt Selig has been with the company for 20 years, all of them as CFO. His other hats include the unofficial curator of the product museum ("I've been here long enough for that") and the de facto director of business intelligence. As such, all of his neighboring departments bring him ad-hoc requests for various reports and data analytics.

"Last year I probably spent 20 percent of my time in Excel cobbling together reports for others," Selig said. "Sometimes it was easily half a day's work for one single request." When the inevitable follow-up questions are factored in, it's easy to see how Selig's main job could be delayed by data.

They were painfully aware that their existing reports, produced in Crystal Reports, were a little too standardized and a lot too static. "There was not a lot of intelligence in those reports – they were more like a raw dump of facts. That made it hard to spot trends," Selig reflected. "As soon as you had a question that was just a touch different from what the reports were built to answer, we had to go get raw data from accounting and crunch it in Excel."



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Falling Prey to Data

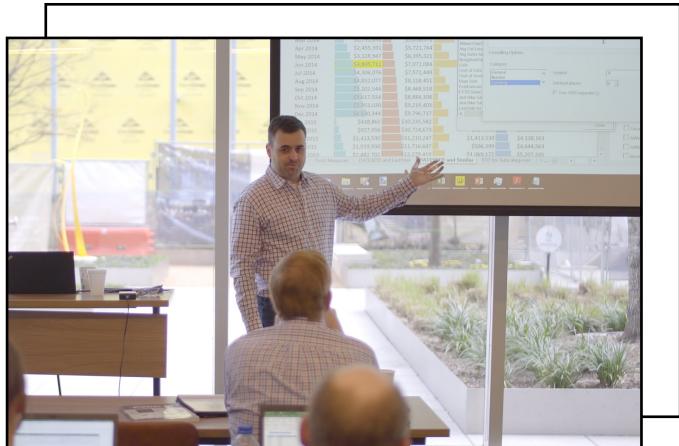
For a company dedicated to solving problems, SerVaas needed some help with solving problems of their own. Yet with a brand as recognizable as Bar Keepers Friend, Selig said it's hard to distinguish genuine helper from mercenary.

"We get approached by lots of high-end software companies promising amazing reporting out of the box with no effort on our part," Selig said. "It all sounds a little too good to be true." The same, he added, was true of consulting firms. "It's so hard to know if they're truly competent." Or perhaps worse, he added, "predatory."

Lean and clean SerVaas could not take the risk of falling prey to a solutions provider that would sneakily eat away at its budget.

"In many ways, Selig recalled, "it was better to do nothing than to make the wrong choice."

As a result, Selig remained consumed by the manual slicing-and-dicing of his data.



Dreaming of Dashboards

That was until he discovered a book about Power BI, Microsoft's business analytics service, on his wife's bookshelf. "I didn't understand much of what was in there," he laughed. So, he went to YouTube, watched some videos, and saw a sales dashboard demo. "I was hooked."

Selig headed to a nearby bookstore where he happened upon another Power BI book, this one written by none other than P3 Adaptive's own Rob Collie. "I Googled Rob's name, watched some of his interviews, and even casually reached out but resigned myself to the belief that it would be beyond my budget."

In the meantime, Selig made a napkin sketch of his own dream dashboard. He carried it with him for over a year until he found a way to bring it to life. "I wanted heat maps, a look at my top 20 customers, my customer types, salespeople. I wanted it all." Then one day, after being pitched by yet another high-pressure software firm with an unimpressive proprietary solution, Selig reached out again to P3 Adaptive. "This time I was serious."

The SerVaas and P3 Adaptive partnership began with a three-day "Jumpstart." "Committing to a three-day engagement was a safe entry point for us," recalled Selig.

Instant Impact and Insights

While the Jumpstart process is refreshingly short on risk and commitment, it is long on results. The intensive, hands-on format often yields surprisingly immediate impact, and SerVaas' experience was a textbook example. "By the end of the first day," Selig recalled, "we already had dashboards worth showing to the team and were already making discoveries about our business that we never had before. After three days, we saw our data come to life, almost like those construction time-lapse videos."

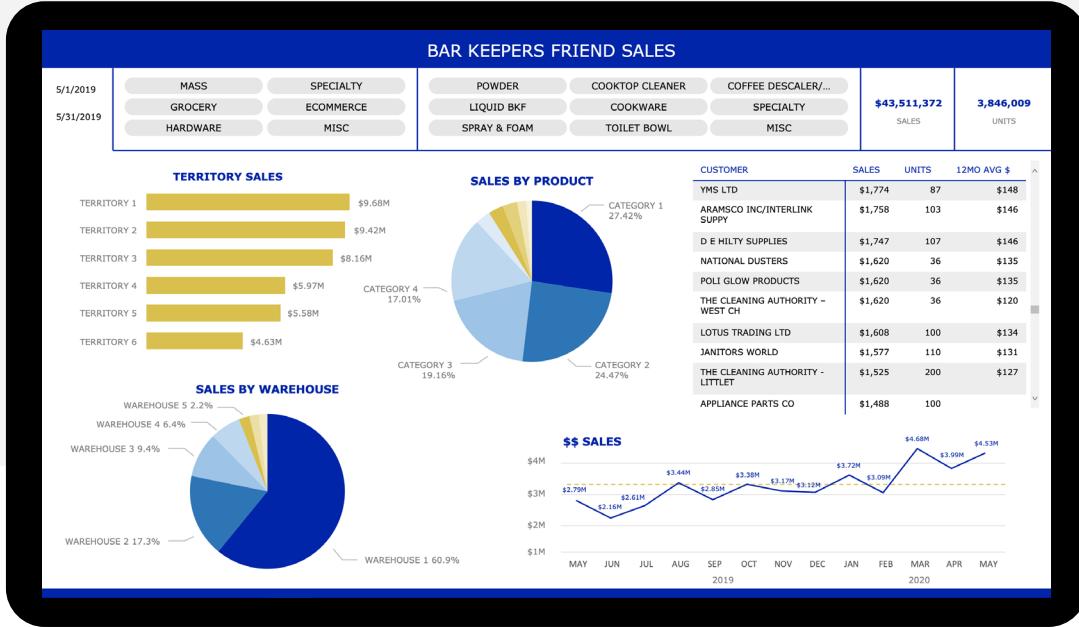
Previously, the manual labor required to answer questions meant the team would often not notice a significant change until weeks later. "But with our new dashboards," Selig boasted, "we can see spikes almost immediately because they update every 24 hours." And, they can dig deeper into regions, customer types, or several other factors to identify and analyze trends in-the-moment. "Before Power BI, we could only scratch the surface of what the data was telling us. Now, thanks to P3 Adaptive's work, we are answering questions we didn't even know we had."

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MATT SELIG, CFO @ BAR KEEPERS FRIEND





Keeping the Shelves Stocked

Those dashboards were built right in the nick of time. About two weeks after the Jumpstart, the COVID-19 crisis began to be felt in earnest across the United States. As many businesses were just trying to stay afloat, SerVaas Labs had an altogether different challenge.

"We sell cleaning products," Selig said. "In March, our sales exploded."

The new dashboards allowed Selig and his team to quickly validate and understand the abrupt changes. They recognized that growth was not happening across the map. "Some customers' orders had fallen to zero, while others were up 40 percent and 120 percent."

"It was all being driven by specific channels and retailers, and that was very easy to see in the Power BI reports. We had a grasp on all of this almost immediately."

Armed with this new data and, more importantly, an understanding of how it affected everyone's role, the team marched off with their own assignments.

"We redirected some of our output from the 'zero' customers to the 'exploding' customers, preventing us from over-producing. But we still needed to ramp up production quite a bit," Selig explained. This meant running the entire factory during the second shift as opposed to only running a third of the equipment. "That's a big change with many details. We were re-organizing our entire operation on the fly." At a time when supply chain issues were giving retailers and customers headaches, SerVaas Labs was able to quickly adapt and keep its product in stock.

Friend of the Bar Keepers Friend

Data is only as good as the actions it empowers you to take. For SerVaas Labs, that meant eliminating processes that would take hours, days, or sometimes weeks and replacing them with a seamless background system that produces clarity in seconds. “The data part of these business changes was now the easy part,” Selig shared. “I didn’t really have to think about the reports. They simply enabled us to focus on responding to the news. It’s night and day compared to what we were doing.”

Power BI is now the behind-the-scenes hero that helps the whole operation shine. “I’m super glad we never signed a deal with a different software provider,” Selig reflected. “Power BI has proven to be many times better than anything we were ever pitched before.” Not to mention many times less expensive.

“Of course,” he added, “Power BI doesn’t promise out-of-the-box results. The things P3 Adaptive built for us gave us the confidence we needed. There’s a lot of competitive advantage to be had, and we’re just getting started.”

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Polishing the Remaining Financials

Looking beyond the current crisis, P3 Adaptive is now helping SerVaas advance the work that was done in those first three days. Taking cues from the company's new revenue reports, P3 Adaptive built dashboards to analyze expenses and inventory data, and incorporated margin metrics so SerVaas can take its financial analyses even deeper – exploring not only revenue, but cost and profitability.

This can uncover uncomfortable realities, but Selig and his team are up to the task. “It has exposed some operational weaknesses on our end,” he said. “But everyone is committed to learning and implementing the necessary fixes.”

Inventory management had been one of those opportunities Selig wanted to tackle. Data analysis was manual and tedious. The resulting metrics were unreliable, leading SerVaas to err on the conservative side of inventory storage to reduce the risk of running out of product. To help SerVaas understand the impact of that decision, P3 Adaptive built new dashboards incorporating inventory data. The dashboards inspired immediate action: SerVaas recognized they could reduce inventory by one third and, with additional operational changes, realize over \$1M cash flow improvement.

Selig lets the results speak for themselves. “I don’t have to sell Power BI to my team,” he said. “I don’t have to twist their arms to use it.”

Our leadership and sales teams are enthusiastic about these dashboards. They’re using them and seeing the value.”

Power BI has improved SerVaas’ workflow, saving them time and money on everything from daily to quarterly tasks, such as producing customer audits. As Selig said, “Many people now have more time to do their main job because they no longer get bogged down in data processes.”

“This is beyond anything we could have dreamed of doing in the next five years. We went from feeling old-fashioned to cutting-edge in a very short time. Everyone sees this as life-changing. It’s really driving change.”

Investing in BI is Always a Good Idea

Business intelligence can, in 2020 terms, be considered an essential service: always open for businesses and always a good bet. When times are good, it can keep your company in its groove and on its path. When a crisis hits and suddenly you can’t trust yesterday’s map, it can help you draw a new and accurate one quickly.

P3 Adaptive is built in the image of Power BI. We’ve seen its impact in good times and uncertain ones. And one thing’s for certain: understanding your data is far too important to sit idly by.

*Ready to Jumpstart? Let us know.
In the meantime, stay safe and
keep your hands (and your
handrails) clean.*

www.p3adaptive.com