

## CASE STUDY

# Clif Bar & Company Reinvents Financial Reporting in JDE with Preferred Strategies

Born on the “epiphany” bike ride, the idea for a better-tasting, more nutritious energy bar was the brain child of Gary Erickson in 1990. Today Clif Bar & Company is the leading brand in all-natural and organic energy and nutrition foods and drinks. Now a global employee-owned organization, the company focuses on the following five aspirations: Sustaining our Planet, Community, People, Business, and Brands.

### New Business Processes From Legacy Data

As the company has grown from the IT infrastructure has grown based on numerous data silos. The distributed storage and compute environment required complex Extract, Transform and Load (ETL) functions to create a unified view of the data. Consequently, ad hoc reporting across the organization required IT involvement and often took weeks from request to insight.

The company’s existing BI and reporting tools were being discontinued and the decision was made to implement a data warehouse to host their future reporting requirements. Responsive BI & reporting with more fluid access to data was a requirement for multiple financial reports including; corporate income statements, brand P&L, budget to actual, and corporate balance sheet.

To empower many more business users to gain rapid, self-service reporting and business insights from the company’s data it was decided that a central “single source of truth” and other master data management best practices should be established. This data environment needed to connect and work seamlessly with the Microsoft® productivity tools and IT infrastructure that employees were already using.

### QuickLaunch To The Rescue

The self-service reporting and analytics environment delivered by Preferred Strategies’ QuickLaunch solution has delivered a substantial reduction in “time to insight” across the organization.

“We had big plans but tight budgets. After careful review we selected Preferred Strategies for their track record and their products’ ease of use. We have not looked back since.”

### Dave Hartwell

Director, Business Applications

### COMPANY SNAPSHOT



**Company:** Clif Bar & Company

**Industry:** CPG

**Challenge:** Extract self-service data out of JD Edwards to provide faster reporting and analytics across the business

**Solution:** Deploy Preferred Strategies’ QuickLaunch to enable self-service reporting & analytics

**Result:** QuickLaunch has transformed how Clif Bar & Company sees their data. Reports that used to take days now take minutes to produce.





The solution provides individual users the ability to easily drill down into specific areas of interest, for example; from summaries to general ledger details. This makes the overall JDE data more accessible and valuable throughout the organization. The IT-governed, self-service data environment has empowered IT to be even more responsive to the business. Visualizations combined with historical data have provided cost-saving insights to the organization. Moving beyond the General Ledger module and other financial reporting and visualizations, the company is now using other QuickLaunch modules in AP, AR, Sales, Inventory, Procurement, and Manufacturing areas.

### IT Endorsed And Governed

The Clif Bar & Company runs a lean IT department and as new business users requested access to data it was clear that a new infrastructure and methodology was required to remain responsive to requests. The IT department decided to implement a central data warehouse build on the Microsoft server stack. Nightly data Change Data Capture (CDC) imports from the JDE Enterprise One environment to the data warehouse means business users have near real-time access to reporting data in a self-service model. Inbound requests for reports have dropped significantly as users become self-sufficient and this allows IT to take on the role of data governors and stewards and open up new data sources for business users to access.

### Changing The Way You Look At Your Business

In finance the general ledger is now accessible to the executive team and board as a series of visual dashboards. Reports that used to take days to produce now take minutes. As the business has grown so too has the complexity of running it. The traditional way of managing reports using Excel simply cannot keep up with the way senior management can now instantly visualize their business using a purpose-designed KPI dashboard. This visualization acts as a launch point for the business user to drill down into individual line items to whatever level of granularity is required to get an accurate picture of the business and make informed decisions.

Before you start out on a bike ride you must prepare well, embrace the challenge, expect the unexpected, and undertake regular maintenance to eliminate breakdowns. Turns out, deploying a self-service data environment to facilitate expedited reporting and analysis has the same set of disciplines. Clif Bar, who knows something about that kind of journey, has embraced the ride and never looked back.