

## CASE STUDY

# Clif Bar Reinvents Self-Service Analytics in JDE

Clif Bar & Company crafts nutritious and organic food to feed and inspire adventure, including the CLIF BAR® energy bar; CLIF Kid®, Nourishing Kids in Motion®, and LUNA®, The Whole Nutrition Bar. Family and employee-owned, the company is committed to sustaining its people, brands, business, community and the planet.

### Growing Up Together

JD Edwards has been in use at Clif Bar since the early '90s, upgrading from JD Edwards World to EnterpriseOne in 2010. The ERP system is used broadly across the organization, including JDE Modules for: General Ledger, Accounts Receivable, Accounts Payable, Sales, Procurement, Inventory, and Manufacturing. They also use JDE for Logistics, Work Order Processing, and Shop Floor, and have integrated RFgen barcode scanning.

As the organization has expanded and evolved, introducing self-manufacturing and European distribution operations, so too have the demands for faster and more sophisticated reporting and analytics. To keep up, Clif Bar has advanced its use of reporting technology over the years— from Excel to PowerPivot, to tabular models and SQL Server Reporting Services (SSRS) plus Microsoft® Power BI—to introduce a modern, self-service analytics environment for business users.

### A New Data Environment for New Business Processes

Over the years, Clif Bar grew its IT infrastructure 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 their 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 and 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.

### From Silos to Self-Service

To empower many more business users to gain rapid, self-service reporting and business insights from the company's data, the IT team determined 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.

#### COMPANY SNAPSHOT



**Company:** Clif Bar & Company

**Industry:** Consumer Packaged Goods

**Challenge:** Unify data silos and extract data out of JD Edwards to provide faster financial reporting and analytics.

**Solution:** Implement Preferred Strategies Enterprise Data Warehouse solution and Preferred Strategies QuickLaunch™ for Microsoft® Power BI.

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



*“Power BI and QuickLaunch have given us a giant leap forward.”*

**TODD WILSON, SVP, INFORMATION TECHNOLOGY  
CLIF BAR & COMPANY**

Clif Bar partnered with Preferred Strategies starting in 2013 to implement the Preferred Strategies Enterprise Data Warehouse solution, Preferred Strategies QuickLaunch™, and Microsoft Power Pivot to the finance and accounting teams. QuickLaunch accelerators transform the cryptic JD Edwards data model into a familiar, intuitive format business users can understand.

In 2016, Clif Bar began self-manufacturing and now make 70% of their products across two facilities. This resulted in exponential growth of both the size and complexity of their accounting data, calling for further expansion of their reporting and analytics capabilities. The IT team worked with Preferred Strategies to roll out QuickLaunch for Microsoft Power BI, along with SSRS for financial statements.

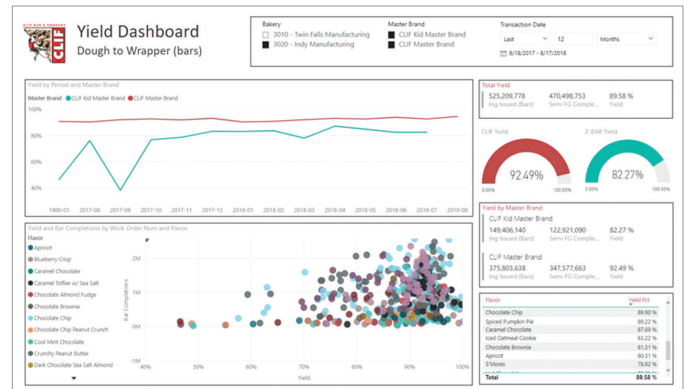
These new tools, along with the data warehouse, offer a self-service analytics environment to the finance and accounting teams. Business users can access, analyze, and manipulate data. Importantly, data is now instantly available to users, whereas they previously had to wait on IT for all reporting. Continuing to build out the environment, Clif Bar implemented Preferred Strategies tabular models, making it even faster for users to leverage and analyze data.

### Speed of Delivery

The Preferred Strategies solution has made it possible for business users in the finance and accounting groups at Clif Bar to handle ever-growing volumes of data, access data quickly, and deliver reports and information an order of magnitude faster compared with the previous system. For example, one key win has been matching promotions to sales and shipments. “Power BI and QuickLaunch have given us a giant leap forward,”

*“Preferred Strategies has been instrumental to our success and I can’t speak highly enough of Preferred Strategies team members. We get responses to our questions in minutes, and their skills and expertise are nothing short of exceptional.”*

**TODD WILSON, SVP, INFORMATION TECHNOLOGY  
CLIF BAR & COMPANY**



*This sample dashboard illustrates the types of reports and visualizations that Clif Bar employees now have at their fingertips, giving business users the real-time data needed to make competitive decisions. The screenshot shown here contains sample data only, and does not represent actual Clif Bar information.*

said Todd Wilson, SVP, Information Technology for Clif Bar & Company

General Ledger data is accessible to the executive team and board as a series of visual dashboards, and reports that used to take days to produce now take minutes. The self-service model and ease of use have reduced inbound requests to IT, freeing up cycles for the team to work on strategic projects and initiatives.

### Always Evolving

The evolution continues. In addition to using Power BI for finance and accounting reporting and visualization, the organization is starting to roll out Power BI to users in the sales and food supply groups. The goal is to push out information analysis across the business, initially through Centers of Expertise, to fully leverage the tools they have to make informed decisions. “QuickLaunch and Power BI together address one of our biggest challenges,” said Wilson. “We are not a high tech company, but the ease of use of these tools bridges that gap for our business users.”

In the near future the IT team plans to integrate additional non-JDE data sources with JDE data, for example point of sale (POS) data and syndicated data, to broaden and enhance the types of insights that can be gained from their existing data.

Additionally, Clif Bar plans to use predictive analytics for manufacturing and sales, and explore ways to apply machine learning to increase insights and reduce costs.