



## Empower Business Solutions Case Reference

# Imler's Poultry Automates Monthly Salesperson Budgeting Process

“Our salesmen get sent a report automatically via e-mail weekly telling them what customers and items have had a downward trend in sales. This enables them to proactively call the customer to find out if there is a problem and find out why.”

*Brian Imler, Director of Sales*

### The Challenge

Each salesperson is tasked with a specific annual budget of Lbs Sold, Sales Dollars, and Gross Profit. These budget numbers are further broken down by Classes of product (Beef, Chicken, Seafood, Turkey etc.), and by Month of the year. For instance, the budget percentage for Turkey in November, (Thanksgiving) is higher than the other 11 months. These budget numbers were manually entered in an Excel spreadsheet.

After determining the budget numbers for each salesperson, per class, per month, the actual sales numbers had to be determined, cut and pasted into the spreadsheet. Then the calculations (Over/Under Budget) determined, and finally the individual spreadsheets distributed to each of the salespersons, as well as a corporate rollup for management. This process took many hours at the end of the month to be calculated, and more importantly each salesperson had to keep crib sheets to keep track of where they were at compared to budget during the course of the month.

### The Solution

The solution had to be twofold. First automate the entire process to (1) free up personnel who were manually collecting and organizing the sales and budget data and (2) eliminate human error. Secondly, to shorten the Turnaround times to supply everyone with fresh, actionable data.

Empower created a control panel where the annual budget numbers were setup once for each class and salesperson for the entire year, along with the monthly percentages for each. Then we created a Cube (Data Warehouse) that automatically re-calculated the current results DAILY, and allowed the Budget and actual numbers to be retrieved by salesperson, class, Year, Quarter, Month, Day, or ANY combination of them, using Excel 2007 pivot services as the viewer.

**Customer:** Imler's Poultry

**Web Site:** [www.imlerspoultry.com](http://www.imlerspoultry.com)

**Customer Size:** 300 employees

**Location:** Altoona, PA

**Industry:** Distribution

### Customer Profile:

Established in 1903, Imler's Poultry is a food distribution company headquartered in Altoona, Pennsylvania. The company services both retail and foodservice customers throughout the Eastern United States.

### Software and Services:

- Microsoft Dynamics GP
- Microsoft SQL 2005
- Microsoft Analysis Services - part of MS SQL 2005
- Microsoft Reporting Services - part of MS SQL 2005

### Hardware:

- Dell Servers
- Dell workstations and laptops

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## About Empower Business Solutions:

Empower is Gold certified Dynamics GP partner located in Altoona, Pa. Empower has been implementing ERP solutions since 1989.

We have a passion. It's in our name -- empower. We empower organizations to make better business decisions by revealing the strength of their own data. Our proven expertise in technology puts us in a unique position to bring that passion to reality. Our tools enable our clients to gain control over the unlimited amounts of information they are collecting everyday so they can base decision-making upon real-time, accurate information. We give them a picture of their world in a new way. We save them time and money by automating processes and eliminating the need to re-key data into Excel or other silo analysis systems. We help them to reach objectives more efficiently, and with a greater likelihood of success.

### Empower Business Solutions

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Next we created a Reporting Services Report that used the data warehouse as the data source, and at the end of each week PUSHED their Budget Report via email to each of the salespersons, showing their current budget vs. actual numbers. In addition each salesperson has access to run their own report on a daily basis, allowing them to track their sales vs. budget daily, thus allowing them to react in a timely basis.

### The Benefits

Since each salesperson can run their report on a daily basis they are able to proactively manage and meet their sales targets during the course of the month. Each salesperson has commented they now have a much better picture of their sales progress.

Management who has the additional option of viewing individual salespersons results or a rollup of the entire sales force also can proactively manage each salespersons progress on a daily basis.

**“The quality of information we now have at our fingertips to make accurate decisions is way beyond what we ever imagined. With Empower and Dynamics GP there are no hurdles today and going forward”**

*Clyde Monahan, General Manager*