Sunny Delight Beverages Co. is a leading producer of juice-based drinks in North America with four brands, including its flagship, SunnyD. When the company was spun off from Proctor & Gamble, eight different legacy business intelligence applications were in place, all with independent silos of data.

Opportunity: Eliminate Data Silos

In this environment, SunnyD executives would receive conflicting figures because end users were working off unique silos of data. This disparity led to revenue unpredictability, lower margins than necessary, high inventory buffers, and a lack of understanding true profitability from sales promotions.

SunnyD embraced the opportunity to modernize and take a strategic approach to business intelligence. CIO Shawn Roberts recognizes that data democratization has empowered end-users to make decisions at the speed of business. At the same time, IT must provide governance and a holistic view of the company’s data, so that decisions aren’t made using conflicting metrics.

The legacy systems SunnyD had in place were too monolithic to support user self-service and agility. End-user data discovery tools, on the other hand, would amplify existing data silos. Therefore, Roberts, working closely with the CFO, created a cross-functional team from managers in six lines of business: sales, marketing, production, logistics, warehouse, and accounting. They evaluated 17 different vendors before committing to Birst. Birst integrates data from multiple sources with transparent data governance, while at the same time providing self-service analytic capabilities to both technical and non-technical users.
Value: Profit Maximization Across the Supply Chain

Birst provided SunnyD with an all-in-one platform for data aggregation, refinement and governance, with department-level dashboards customized on-demand. Its comprehensive solution enables the lines of business with department-level agility, but also provides enterprise-wide data consistency. This cross-functional visibility has created tremendous business value. For example, promotional uplift, traditionally measured by marketing, also impacts shipping expenses, which are measured by logistics. By recognizing this interaction, SunnyD has been able to make improvements in both areas.

Promotions & Distribution
SunnyD’s initial use of Birst was to understand store promotions and their impact on distribution. Without visibility into promotional uplift, SunnyD was paying considerable expedited shipping fees to ensure on-time fulfillment. With Birst, SunnyD improved not only promotion forecast accuracy, but also visibility into transportation schedule dependencies. By pre-shipping at lower rates in advance of holidays and weekends, SunnyD has saved 7% on transportation.

Sales & Operations Planning
Using Birst, SunnyD is able to understand store-level inventory and seasonal changes in real time. With dashboards highlighting low stock and thresholds, SunnyD can replenish supply “just-in-time,” increasing customer offer uptake (sales) by another 2%. With more effective order and fulfillment processes in place, as well as an understanding of true demand, SunnyD has been able to decrease volumes at plants and change production schedules to reduce overtime costs by 90%.1

Staffing & Resource Costs
SunnyD’s second use case for Birst was around staffing and resource costs. By understanding workload patterns in their outsourced customer service and order-fulfillment teams (overtime and temp schedules), SunnyD has decreased the amount of contract staff, saving $195,000 annually.

Inventory Accounting
Better inventory visibility and record accuracy reduced the need for reconciliations and helped SunnyD scale

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back its accounting department by 50%. All financial analysis is now done within Birst, and the accounting team meets its 48-hour deadline to close out the books.

Networked Business Intelligence

SunnyD’s siloed data challenge was hardly unique. According to McKinsey & Co., many companies lack cohesive strategies for how data, analytics, and people should come together to drive business value. In large enterprises, data typically exists in department-level silos with shadow teams performing analytics. When these analytics don’t true up, the company spends cycles trying to get an accurate sense of its various positions, instead of acting on those metrics with a coherent strategy and execution plan.

Gartner also talks about the rise of data discovery and user access to analytics, emphasizing the need for governance. Gartner predicts that by 2017, most business users and analysts will have access to self-service tools to prepare data for analysis, but that less than 10% of self-service BI initiatives will be governed sufficiently to prevent inconsistencies that adversely affect the business.

Networked Business Intelligence is a transformative approach to BI and analytics. It respects the central governing structure and semantic constructs of legacy BI, while recognizing that legacy BI cannot keep pace with business demands for agility. Birst’s technical value to SunnyD has been in integrating data and providing governance around previously siloed data sources, while also providing self-service analytics capabilities to both technical and non-technical users. As IT teams look to harness an increasing amount of data and connect silos to better serve their customers, they should look to the benefits of Networked BI.

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# CASE STUDY

**Birst Networked BI Business Benefits**

<table>
<thead>
<tr>
<th>Birst Networked BI</th>
<th>Business Benefits</th>
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</thead>
<tbody>
<tr>
<td>✔️ Unify complex data across sources</td>
<td>Broad and complete business visibility, quickly</td>
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<tr>
<td>✔️ Analyze complex processes &amp; models</td>
<td>Real time sync across users and departments</td>
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<tr>
<td>✔️ Blends centralized and decentralized</td>
<td>Enable local agility with global views</td>
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<tr>
<td>✔️ Trust and reuse key metrics</td>
<td>No more arguments over numbers</td>
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<tr>
<td>✔️ Users can use a variety of tools</td>
<td>Drive adoption, usage and self-service</td>
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<tr>
<td>✔️ Fast time to value, every deployment</td>
<td>Short time and cost to deploy = lower risk</td>
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<tr>
<td>✔️ Economically scale, on demand</td>
<td>High performance and superior economics</td>
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Using a sound strategy for selecting and deploying an integrated data analytics approach…enabled us to cut costs related to production planning, transportation, customer profitability, and more.

~ Shawn Roberts, VP & CIO, Sunny Delight Beverages Co.
Future Plans: Customer Analytics, Retail Integration, Social Media

The next phase of SunnyD’s BI project will be built around customer analytics. Using point-of-sale, logistics, buying, merchandise, and social media data, SunnyD will measure promotion effectiveness with a specific focus on new products. For example, a new energy drink, SunnyD X is being sold and promoted only in certain Northeast corridor markets. Are store shipments increasing as a result of the promotions? And is the SunnyD brand awareness increasing generally, or just the awareness of heavily promoted DX? Eventually, SunnyD will even provide data back to customers such as Walmart for better trade fund and shelf-space decisions.  