

## Loeb Selects Epicor Data Analytics to Drive a Data-Driven Culture and Growth



### Company Facts

#### Overview

- ▶ Location—Columbus, Ohio
- ▶ Industry—Consumer products
- ▶ Website—[www.loebelectric.com](http://www.loebelectric.com)

### Success Highlights

#### Challenges

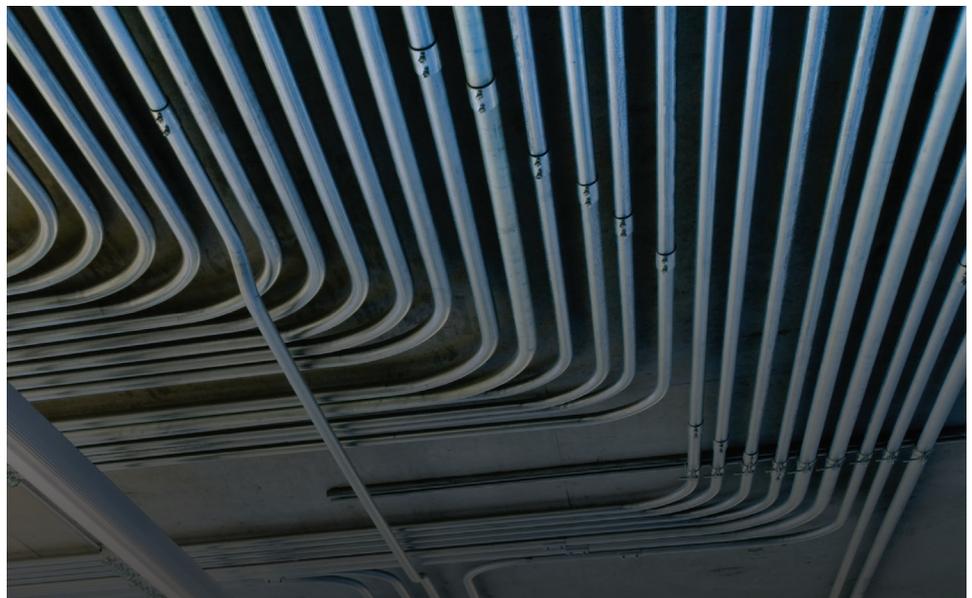
- ▶ Clunky and cumbersome existing BI tool
- ▶ Difficult to communicate with those that needed data
- ▶ Time-consuming to produce reports
- ▶ Need to increase adoption of data analytics

#### Solution

- ▶ Epicor® Eclipse™
- ▶ Epicor Data Analytics (EDA) powered by Phocas

#### Benefits

- ▶ Navigation is intuitive for users of all skill levels
- ▶ Dashboards provide macro-level detail of performance and information for the frontline
- ▶ Easy to manage, predict, and track trends of national sales information
- ▶ Override feature tracks pricing changes
- ▶ Managers use custom dashboards for internal staff reviews

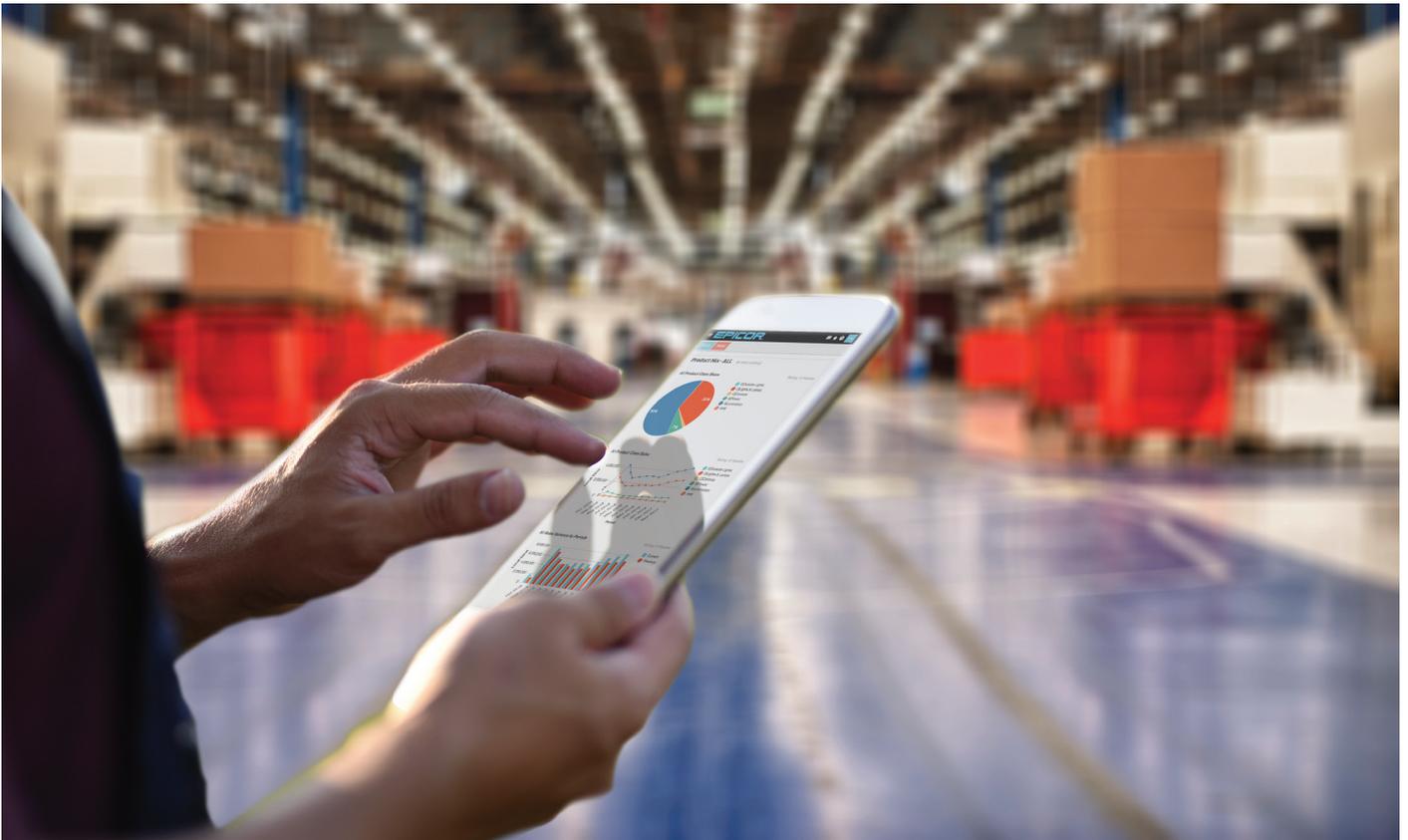


Loeb Electric is a 100-year-old, third-generation, family-owned business with 250 employees spread across four satellite locations and a distribution center in Columbus, Ohio. The company manages more than 10,000 SKUs and ships more than 100,000 SKUs every year to national and global customers.

#### In need of better technology

Austin Sparks, strategic pricing manager, was hired 16 years ago to manage the company's pricing structure. When Sparks started at Loeb, he taught himself how to manage the company's analytics using Microsoft® Excel®. Over the last 10 years, Loeb has grown exponentially, and along the way, the company transitioned to a CRM and BI solution for distributors. "Unfortunately, most people did not like using our BI solution, finding it clunky and cumbersome," said Sparks.

While Sparks was comfortable using spreadsheets to monitor data, communicating with the sales staff, executive team, and others that needed data quickly was a challenge. "In years past, adding metrics to our current setup took significant time and effort, and depending on how we were pulling information, it could take up to an hour or more," added Sparks. As the business grew and data inquiries increased, the company needed better technology. Loeb was finally ready to try a different approach. Sparks and his manager at the time, John Barney, evaluated a variety of solutions. Ultimately, they chose Epicor Data Analytics (EDA) powered by Phocas—a fully integrated data analytics solution for the Epicor Eclipse ERP system.



EDA is used across a variety of departments, and Sparks trains his heavy EDA users who are responsible for building dashboards, favorites, and reports for other Loeb team members. There are dashboards for the macro level of the company's performance and dashboards updated daily for users and teams located on the frontlines of the business.

### Creating "Aha!" moments for the sales team

Among the most active EDA users are the sales team members. The company has 50-75 people involved in sales with reporting managed by the sales managers across local and national teams. On the national side, much of the information is forecasted because of the high-volume of transactions—making it easier to manage, predict, and track trends.

Sales managers at Loeb's local satellite locations around Columbus use EDA to compare their performance against other stores and the main hub. A local sales team—which works closely with Sparks—uses EDA to identify potential gains with customers.

"Reporting is great, but you have to use EDA to see the benefits, and I am trying to get more sales people to use the solution so they can find more value in the data," said Sparks. "I am trying to create 'Aha!' moments that will get the sales team hooked on using information to increase their opportunities with current customers."

Overall, the company has seen great adaptability from both the inside sales support staff and outside sales team, which use EDA every day to see how they are performing and to monitor transactional trends.

One of the main benefits of analyzing growth and profit margins is the override feature, which helps management communicate with sales staff about why certain data points are replaced in the system. Sparks uses EDA's historical data to ask questions about specific sales transactions and to monitor override trends among products, customers, and sales reps.

### Beyond sales

While sales may be the most active users, Loeb's IT team has created its own databases and is working to integrate a variety of homegrown solutions into EDA—including systems for retail customers' budgets and restrictions.

Sparks added, "It may be cliché to say you don't want to put all your eggs in one basket, but when it comes to reporting, the opposite may be true. Communicating and training people to use one platform is easier for the

