

case study

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# Spirits Platform

accelerates growth with BOARD  
and Professional Advantage



professional  
advantage



# At a glance

<b>Company</b>	Spirits Platform
<b>Industry</b>	Liquor Distribution
<b>Location</b>	Botany, NSW
<b>Solution</b>	BOARD, Microsoft CRM, SharePoint, Office 365
<b>Function</b>	Finance, Supply Chain, Sales & Marketing

## Key Points

- Spirits Platform was a new business start-up in an industry dominated by multinational corporations. It needed to quickly develop a sophisticated technology capability to establish itself within the national liquor distribution business, or stall at birth.
- Within six months of opening its doors the company deployed BOARD Cloud Business Intelligence (BI) platform with strong budgeting, forecasting and analytic capabilities, and provided staff with mobile access to all systems.
- The solutions enabled Spirits Platform to analyse company, partner and market data, to anticipate trends and develop appropriate sales, marketing and supply chain strategies.
- Two years since opening its doors, Spirits Platform has successfully established itself as an agile, innovative competitor in the premium liquor distribution market.







# The Company

Spirits Platform is an Australian sales, marketing and distribution platform focused on premium spirits brands. Formed in 2015 by a group of highly experienced industry veterans following the merger of Suntory Australia and Beam, the company is driven by its vision to provide the focus, expertise and brand support necessary for premium spirits to succeed in Australia's crowded market. Spirits Platform is led by a highly experienced management team with almost 100 years of experience in the liquor industry.

Although it is a small company, capturing a three percent share of the spirits market in Australia, Spirits Platform has established a strong reputation in the liquor market in the two years since its inception. Its impressive brand portfolio includes well-known premium brands such as Cointreau, Licor 43, Macallan, The Famous Grouse, Tia Maria, Sierra Tequila, Chartreuse, Opal Nera, Zubrowka Vodka, Mozart, Remy Martin and Louis XIII Cognac.

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**David Moore, Director**



# The Need

As a newly formed company with strong growth ambitions, Spirits Platform needed to establish scalable systems and processes to enable its operations; systems that needed to support a primary mobile workforce and geographically dispersed teams.

Specifically, Spirits Platform wanted to maintain a lean workforce; it simply did not have the resources for heavily technical solutions or number crunching in inefficient spreadsheet regimes.

“I knew that going back to spreadsheets would have set the new business back. It would have imposed a bottleneck on the businesses ability to change rapidly without reliance on expensive external consulting. I had also witnessed heavily technical solutions like Cognos in a prior business. On this occasion, we selected BOARD and it addressed Excel’s inadequacies, cut the technical reliance, and gave us the self-sufficiency we were seeking. I would even say BOARD contributed to the company’s growth in a then overall falling market. So naturally I wanted a fast start in the new company –it’s survival was at stake.”

– David Moore, Director, Spirits Platform

Additionally, as a distributor with no direct visibility into end customer purchases or trends, Spirits Platform relies on data provided by bottle shops, clubs, hotels and retailers to understand sales, inventory and market trends. Vital market and customer performance data had to be incorporated into the budgeting process. Without this, forecasts were out of touch with market realities. In this context, a robust business intelligence system capable of integrating data from a variety of sources was necessary to achieve accurate forecasting, budgeting and planning. Intelligent planning tools and business analytics were therefore crucial for Spirits Platform to pave a sustainable path towards revenue growth.



## SELECTING BOARD, A PLATFORM FOR GROWTH

Spirits Platform immediately set out to implement a business intelligence tool. It needed to achieve integration with this vital sales data and leverage forecasting capabilities if it was to launch successfully into the Australian Market. The company had clear requirements for a fast and cost-effective implementation that was within a suitable price range for a fledgling organisation. Director David Moore approached Professional Advantage for advice and assistance in building the new systems to the company's requirements.


Professional Advantage recommended a corporate performance reporting solution with strong business intelligence capabilities (BOARD) to integrate Spirit Platform's planning, budgeting, forecasting, analysis and reporting in a single tool.

To meet the imperatives of speed, cost and mobility, Professional Advantage advised a BOARD cloud-based solution. This would ensure the fastest time to deployment and avoid the hardware costs associated with on-premise implementation.

"From the time we got the green light we only had a nine-week period to set the company up and start trading. We spoke to Professional Advantage and outlined the challenge. They got all the basics done in time, and then working together we completed all our core systems within six months." – David Moore, Director, Spirits Platform.

The BOARD software would be supported by Professional Advantage's deployment of Microsoft CRM, Microsoft SharePoint and Microsoft Office 365 as the foundation technology components. All solutions were familiar to Spirit Platform's Management Team, which ensured a high level of confidence that the applications would meet their business needs.

**"We immediately turned to Professional Advantage because we had had a great experience with them previously. We had partnered before, so we knew the quality of the organisation. With their ability to be flexible with us in both timeline and budget, it was a no-brainer reigniting the relationship."**  
**David Moore, Director**



## PROJECT #1 BUDGETING AND FORECASTING

Spirits Platform and Professional Advantage took a steady and sequential approach to implementation, keeping a focus on simplicity. Rather than overwhelming users with too many reports or features, the approach focused on progressively introducing functionality based on benefits and in response to specific business needs.

Within weeks a budget and forecasting tool was rapidly implemented, alongside initial business intelligence capabilities.

BOARD delivered an immediate outset of a 70% or more reduction in the resources (people, time, effort, etc) required to build a budget and subsequent monthly forecasts. BOARD also delivered a rolling 12-month budget, enabled comparisons between budgets and forecasts, and provided vital "what if" budget and forecast analyses on the fly. A drill through capability from summary level to individual transactions was essential. The system also fostered consistency in the use of market and customer performance data and provided insightful management reports.

## PROJECT #2 BUSINESS INTELLIGENCE

The next immediate phase was to leverage the inherent BOARD Business Intelligence features over the data. By capturing, integrating and analysing data from multiple internal and external sources, BOARD has enabled Spirits Platform to overcome the challenge of distance from the end consumer, ensuring a full and accurate view of company operations. In turn, the management team has been able to achieve an in-depth understanding of business operations and performance, which has driven better decision making. This insight and data then immediately improves budgeting and forecasting, either as key driver data generating financial results and scenarios, or adding context and insight to planner's decision making.

To summarise, benefits realised from the BOARD software solution included:

- The ability to segment customers by profitability which supports the lean sales organisation. This results in much more effective targeting of minimal resources, including assigned brand ambassadors to build deeper affiliations with key clients.
- All sales and marketing activity is thoroughly analysed and measured, enabling team members to identify, analyse and understand the effectiveness of commercial trading investment and other such activities at any time.
- The depth, quality and speed of business information is paying off in agility, which can be seen in Spirits Platform's speed to market and its ability to swiftly adapt to changing circumstances.
- The accessibility of new systems ensures that mobile and remote staff can connect and securely conduct business from anywhere in the world.

## PROJECT #3 SUPPLY CHAIN INTEGRATION AND PREDICTIVE ANALYTICS

Once 12 months of trading had been completed, Spirits Platform and Professional Advantage shifted focus to enabling the business intelligence automation and predictive analytics capabilities of BOARD, with a view to improving cash flow management by streamlining purchasing and inventory management and increasing sales forecasting accuracy.

These vital processes had previously remained in separate spreadsheet systems. Staff were heavily reliant on manual tasks to manage data outputs which were both time consuming and carried a high risk of manual error. In addition, the company's Sales Plan was disconnected from procurement, which led to issues with stock planning and decision-making.

Lastly, with geographically dispersed staff, teams within Spirits Platform were struggling to share information and collaborate quickly.

As Moore explains: "We are a smaller player in the Australian liquor industry and simply do not have the depth of pocket of the larger players to spend on big marketing and sales programs and hold excess inventory. However, we can be agile in what we bring to market and in how we innovate. To underpin this, it is critical to be able to measure the ROI on any investment and we must have systems that can provide us the insight to make quick but informed decisions and best manage our resources."  
– David Moore, Director, Spirits Platform





**“Cash flow management is critical and inventory is one of our largest cash impacts. Our discussions are now more robust since being able to compare and contrast against the forecast created by the sales team.**

**We’ve also moved to daily system BOARD alerts of inventory levels. With stock purchase lead times of up to 10 weeks we were holding too much inventory just-in-case it was needed. This excess is now being eliminated.”**

**David Moore, Director**

# Results

To address this, BOARD was extended in a rapid phase and spreadsheets were removed. BOARD now seamlessly leverages key ERP data, rolls weekly forecasts, and synthesizes predictive forecasts with sales team inputs, generating purchase recommendations and optimising inventory. The automation of the Daily Inventory Report alone allowed Spirits Platform the potential to identify stock issues up to three weeks earlier than previously possible. By combining insights from sales history with the customer demand plans, Spirits Platform is now able to target missing demand, further driving up revenue.

The ability to analyse actuals and forecasts as a live comparison has been revolutionary for the company.

## A PLATFORM FOR SELF SUFFICIENCY

Throughout projects, Spirits Platform and Professional Advantage were mutually focused on ensuring an effective handover of knowledge to enable in-house staff to manage the tool, without excessive reliance on external consultants. The Spirits Platform team learned to use and manage the tool with ease. Furthermore, by using cloud solutions, Spirits Platform has avoided the need to employ in-house IT expertise.

## A SUMMARY OF BENEFITS

BOARD has proven to be scalable, flexible and capable of meeting Spirits Platform's needs. By unlocking additional functionality within the BOARD software (Sales Budgeting & Forecasting and Procurement Planning), Spirits Platform has a richer picture of its business operations and performance. Different information from various source systems is integrated into a single place, improving the quality of data insights and enabling the company to undertake more focused analyses. As a result, the company's budgeting, forecasting and planning processes are now three to four weeks faster than they were prior to the implementation.

From a user perspective, Spirits Platform staff are no longer reliant on Excel to undertake planning. There is a clear and effective integration between inventory planning and sales planning, which has enabled the company to be proactive in responding to or engaging with the market. For example, Spirits Platform can

react in advance to demand changes or unexpected sales and events. There has been a noticeable shift in conversations, from focusing on what occurred in the past to strategising about what steps should be taken next to respond to current events.

Importantly, the integration of key operational data in a single source system has improved communication between teams, enabling them to speak in a common language and achieve a shared understanding of business performance. Team collaboration, as well as data confidence across teams, has significantly improved.

## NEXT STEPS

As a fledgling and fast-growing company, Spirits Platform is continuing to identify areas for further improvement. As business needs evolve and its development budget permits, additional functionality within the BOARD software will be activated.

## About Professional Advantage

Professional Advantage is one of Australia's most awarded solutions providers, with over 25 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.

# Got a question?

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