

## Clade leads St George Foodservice to customer success with Microsoft Power BI

**ST. GEORGE**  
**FOODSERVICE**  
EST. 1980

### St George Foodservice now has real-time multi-dimensional access to customer data

One of Sydney's leading distributors, St George Foodservice delivers a comprehensive range of foods, packaging and cleaning products to commercial sites where food is served. A family business founded in 1980, it was built on anticipating and meeting customers' needs. However, manual reporting was limiting their responsiveness and, when the ERP system they had been using for some years was scheduled for a version upgrade, they decided it was time to reassess their overall data needs.

"The data we were using in that system wouldn't have been compatible with the new version of the ERP software," says Sales Operations Manager Paul Tsiknas who, along with running a sales team, is responsible for business growth. "That was a catalyst for us to see how we could operate more efficiently."

The upgraded ERP system runs on a Microsoft platform so Microsoft Power BI was a logical fit.

### OBJECTIVES

- Streamline reporting
- Ensure that data and ERP are fully compatible

### BUSINESS BENEFITS

- The sales team are able to respond quickly to customer needs
- Time previously spent on producing manual reports can now be used for more productive work

“We asked our IT manager to find a credible Microsoft Power BI partner,” says Tsiknas. “He did a lot of research, spoke to a number of providers and finally settled on Clade because of their experience and reputation in this area. We were all happy with that choice. They were very open and transparent from day one. We were moving at a very fast pace and they were also very responsive.”

“When our reporting was produced manually the sales information we had was at a point in time,” he says. “We had to extract information and insert it into Excel work books which were then distributed by email once a week. Now everything is web enabled so we can access sales information 24/7 via desktop or mobile devices rather than waiting for a weekly email.”

Other benefits include the ability to view customers’ spending patterns over eight weeks and 12 months, and the ability to access customer data for the past three years.

“We can drill down to the invoice level – the fine detail of what customers are buying,” says Tsiknas. “The sales team has access to many different aspects of the data in real time across several dimensions, including sales territory.”

As the project progressed, Tsiknas found that unexpected efficiencies gave people more time to focus on productive work.

“In our sector you have to be very nimble and react fast,” he says. “Now my guys can quickly identify any anomalies in customer spend and talk to them about what they need and how we help.”

St George Foodservice is planning to do more work with Clade.

“We’re currently scoping out a new project with them,” says Tsiknas. “This will kick off in the next few weeks.”

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