COUGAR MOUNTAIN SOFTWARE

MANUFACTURING COMPANY GAINS VISIBILITY INTO PRODUCTION CYCLE
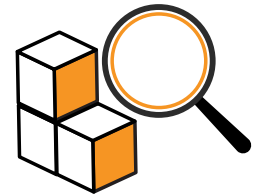
BENEFITS:

SAVED UP TO TWO HOURS A DAY OF WORKING IN EXCEL

ABILITY TO FORECAST ORDERING HABITS

VISIBILITY INTO PRODUCTION CYCLE

COMPANY SUMMARY/OVERVIEW

Based in Danbury, Connecticut, Zendex Tool Corporation manufactures products for the automotive industry from autobody and repair to performance racing. Their products are intended to be some of the most durable on the market and include a self-loading dolly called the GoJak® and a portable air jack called the RakJak™. Before Denali BI, the company was struggling to keep pace with their orders and opted to try using spreadsheets in the hopes of better understanding their sales queue. The format wasn t as insightful as they had anticipated as it failed to provide any solutions to the problems they had. The three key areas they hoped to improve in order to operate faster and more efficiently included:

1. **Finding a better way to track pending orders.**
2. **Prioritizing backorders in the sales queue.**
3. **Gaining a better understanding of their sales funnel.**

THE PROBLEM: OUTGROWING EXCEL SPREADSHEETS

At the start of 2019, Zendex was facing two major problems with their production process. On one hand, they were struggling to give customers an accurate lead time on product delivery. If they said it would take 3-5 weeks, it was taking closer to 6. On the other hand, they didn t have a way to prioritize their backorders from the most important to the least.

To make matters worse, their process was further strained in 2019 when there was a surge in sales. This led to even more backorders and nearly halted production. If they wanted to get orders out the door on time, something needed to change.

> **Denali BI projects what our sales will look like for the next month based our customer s ordering habits and we can order materials ahead of time to better prepare ourselves.**

DENALI BI SOLUTIONS

When our team of BI consultants reached out to the Vice President of Operations,

Dean Coccaro, he was immediately on board to test Denali BI at Zendex. He admitted that the spreadsheets weren t working out the way he d anticipated. They relied too heavily on him manually updating them off each invoice order. Finding a way to get any real raw data was proving to be a challenge. He wanted to move away from manual entry and move closer to an automated system that was less complicated and more efficient.
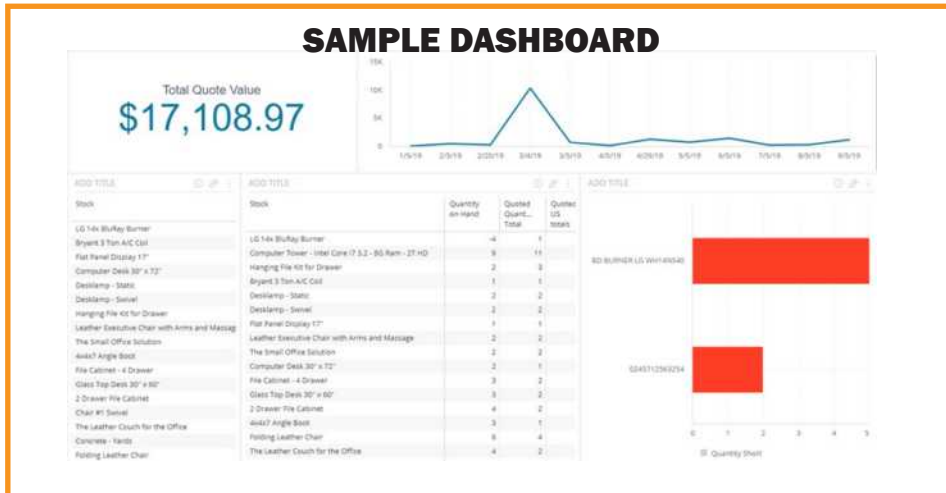
There s a certain number of orders we need each month to keep our business running and with Denali BI I know that if I need to drum up some sales, I can start to offer promotions or bundle products together to get those number up.

SAMPLE DASHBOARD

Total Quote Value
$17,108.97

Unlike most dashboards, Zendex provided us with a unique opportunity to test new boundaries with BI. The goal of most BI dashboards is to create sales and expense reports. With Zendex, however, the end goal was to improve their production process. Their growth was so fast that they couldn t keep up with the pace of orders coming in.

They needed a better way to prioritize their backorders and eventually get caught up. They also needed to free up more time for Dean to focus on dealing with his business s growth instead of getting bogged down with updating spreadsheets.

IMPACT: LOOKING AHEAD

Two months after delivering the dashboard to Zendex, the results were better than we anticipated. The dashboard was giving them a visual representation from multiple data sources that were updated daily. Dean reported how they were close to weening their company off spreadsheets as they adjusted their business model to BI. The efficiency of backorders was up as well since the dashboard showed employees which orders needed to be fulfilled first, allowing Dean to accurately inform customers of when their order would be delivered.

On top of being able to prioritize backorders, Dean could also see how sales were performing, giving him the ability to discount products or package products together in order to meet sales goals and increase their revenue. The data he sees through Denali BI is accurate, up-to-date, and straight from the source. Because of Denali BI, Zendex can finally withstand the amount of orders coming in while keeping their production line running efficiently. Now, they are back on track and ready to bring their company to the next level.