



# The Hess Collection Winery

## CASE STUDY



THE HESS COLLECTION

# Setting the Stage

Any company with over 150 years of experience under their belt can be stubborn when it comes to switching their data collection methods. And with that many years of *successful* business behind them, they've somewhat earned the right to be hesitant.

However, a **forward-thinking business** also has the ability to separate *tradition* and *growth opportunity* – and **The Hess Collection Winery has been able to see the profitability in choosing the latter.**

The Hess Collection has been a staple in the wine industry for years, but in 2003 they realized **there was a data ceiling they were reaching and they knew they still had room to maximize their potential.**

With the help of a BI specialist (Business Impact) and a top-tier software (TARGIT), they were able to *seamlessly* integrate new technology into their operations and quickly learn the ropes to grasp total control of their company's data – all while experiencing **record success.**

This case study will take you through the timeline and progression as to how The Hess Collection was able to find a true solution that suited their data needs while saving hundreds of man-hours and boosting their bottom line.

## The Hess Collection before Business Intelligence

Prior to finding their optimal BI solution, The Hess Collection was struggling to maintain their information in convenient formats and locations. Data was scattered in disconnected databases to the point where simple tasks like combining information for like-minded departments was impossible – hindering basic data sharing capabilities that are necessary within a thriving organization.

For example, combining shipment and inventory data into one spreadsheet was time-consuming and daunting, **leaving employees** with the inability to get real-time data that they could rely on.

Their first attempt to invest in new software was with Microsoft Dynamics NAV. However, despite its promised flexibility and ease, the transfer of data off the NAV system into other spreadsheets was impossible – leaving The Hess Collection with a rather useless software investment.

# A Solution is Found in TARGIT

After falling short of landing the perfect business intelligence software to handle their inner workings, The Hess Collection soon found luck with TARGIT. “I liked TARGIT’s ability to let me manage it myself and build my own cubes,” says Andrew Ridling, the Director of Business Information Systems. The decision was clear for Ridling. TARGIT served as the best solution that was both sophisticated *and* flexible — **all at a price point well below their competitors.**

“I was in control of what I wanted to get. I knew what I wanted to get in terms of data and this gave me the flexibility to map it in the cubes. I didn’t have to wait for someone else to pull it for me. I didn’t have to subscribe to a service and pay to have them build it for me. I’m more of a get-my-hands-dirty type of person, so I’d rather do it myself. That’s what I liked most about it.

At my last job, if I wanted new dimensional measurements, the executives would say, ‘we’ll evaluate that in a year or so when we discuss databases and cubes.’ But now? If we (at The Hess Collection) want something, we can have it in the snap of a finger.”

Ridling admits that it was the price that first caught his attention, but it was the control that made him sure of his decision: Before making use out of the new TARGIT technology, Ridling took a 4-day crash course in Los Angeles with a certified professional. He built his first cube in a matter of weeks, purchased the software and the server and then was on his own soon after the training session.

## Perks of the New Software

### Locating Data Points

Coming back to Napa Valley, he had the capability to **identify which data points** were needed to display the information that was pertinent to The Hess Collection’s business performance. This ability saves companies ample amounts of time as displaying only the needed data saves employees from suffering from information overload.

### Cross-Tabbing

Right out the box, Ridling recalls being able to explore cross-tabbing, a feature in TARGIT that gives users the view of data from year-to-year, month-to-month and quarter-by-quarter — a capability the company didn’t previously have.

## Forecasting & Triggering

“Forecasting was something we couldn’t have done without taking hundreds of hours working with disparate spreadsheets. We use forecasting quite a bit. Paul Righello (The Hess Collection’s Business Analyst) used to do forecasting as a job and a manual forecast would take about a week. **Doing one in TARGIT can take as little as ten minutes.** And it is far more accurate.”

Triggering also gives Ridling the chance to identify problem areas within their organization. The *Triggers* feature answers the question “why is my business down” or “what’s *really* driving my business?”

“When we get asked a question, we can answer it in minutes using an easy-to-follow dashboard created in Triggers. When people need to know the whys and hows, we’re able to pull up the screen and give them the answers with hard facts. **There’s no more assumptions anymore — there’s facts,**” explains Ridling.

## Reporting

“I had too many tasks dumped on my desk,” recalls Ridling. As these duties piled up, so did the amount of time he was behind on his assignments. The implementation of TARGIT not only managed to reduce his workload, but also lessened the time it took to complete these tasks for the future.

For reporting, it took Ridling no less than 30 hours a month to accomplish. TARGIT’s ability to automate the data and place it in the cube saved 30 hours that are now used for less time-sensitive, more *future-oriented* tasks.

As depletion reporting was the *initial* task that Andy needed to master, **Business Impact was able to take it several steps further.** Now, Ridling is able to manage multiple budgets, goals, wholesale and internal inventory, finance, wine placements and accounts, national accounts, depletion allowances and more.

## The Hess Collection CEO’s Realization that TARGIT Works (A-Ha Moment)

When Ridling was tasked with presenting the TARGIT software to the company’s president, he didn’t know it would change things for the entire company. “The president was a sales guy — and he was *proud* of being a sales guy. He understood how to look at information, but didn’t really get *systems*.”

In his demonstration, Ridling stumbled on the East Coast sales data and noticed that an account was down 200 cases for the year. And of course, the president questioned how that could be. He called the branch immediately and learned that since the branch wasn’t using TARGIT, they too were unaware of this setback.

Needless to say, the president was made aware of the true value of TARGIT when this error was made visible and saved the company potential lost revenue. Thoroughly convinced, the president made sure every branch used TARGIT and even called for more progress. And, it is here where Business Impact came on board.

# Business Impact & Beyond

The union between The Hess Collection and Business Impact was an organic one. The Hess Collection and their data-hungry team made great strides on their own searching for new technology that simplifies data collection.

The meeting between both parties occurred between 18-24 months *after* the implementation of TARGIT. For Ridling and other data-minded employees in The Hess Collection, although their data collection efforts were revolutionized, the actual information they collected was beginning to get stagnant.

"I reached a point where what I put together and what I presented to the company was getting stale. I needed a spark plug... something to WOW the management," said Ridling. And fortunately for The Hess Collection, Business Impact was able to provide that revival.

## 24-Hour Challenge

Doug Hoogervorst (of Business Impact) and Ridling did a **24-hour challenge** where Doug analyzed the data The Hess Collection was collecting. He was able to highlight areas that were continuing to thrive, areas of data collecting that regressed and eventually polished the data to focus on the super necessary segments.

## Present & Future Plans

Business Impact's main goal was to help The Hess Collection access the valuable data that may be hard to find within the infrastructure of TARGIT. As a matter of fact, it's Business Impact's forte to educate clients on how to maximize proper staging, deliverance and presentation of important data. Furthermore, Business Impact continued to train The Hess Collection's small IT staff on the TARGIT tools that are most relevant to their organization.

To be able to continuously improve with a *small staff* and for over 10 years is a testament to the easy usability that TARGIT offers. As a result, this reduced need on an IT staff saves hundreds of work hours yearly (and much more dollars).

With this assistance, each department in The Hess Collection now maintains savvy TARGIT users who are able to deliver concise reports and analyses on a regular basis. Take it from Ridling:

"Business Impact is great at pulling out exactly what we need to cater training and highlight features that work best for us."

And due to this successful partnership, The Hess Collection has been able to continuously improve their business operations with TARGIT for over 10 years now. In this time, **The Hess Collection has been able to enjoy their most financially successful years in terms of sales, profits and case volume.**

## About The Hess Collection Wineries

With 7 different wineries in 3 continents, Hess Family Wine Estates has grown to become an elite supplier of wine for over 170 years. Founded in 1844 by Johann Heinrich Hess, the Switzerland-born business helps to develop and mentor like-minded wineries that reflect the winery's values of tradition, quality and sustainability.

This vision led **Donald Hess** to open The Hess Collection Winery in 1978 in California. The Hess Collection's California vineyards have proven to be a testament to the commitment to sustainable and biodynamic farming practices.

Integrating into the family of seven wineries located in California, Argentina and South Africa, The Hess Collection takes on the core business principle of exercising its willingness to take on *calculated* business risks — and this principle is **maximized** with **efficient data collection and more intuitive business intelligence** (BI).

And for a winery of just over 150 employees that produces more than 650,000 cases of wine yearly, the proper use of big data serves as a necessary tool to continue on the path towards **sustainable growth**.