

CASE STUDY

Beverages Company - Sales Commission Reporting

Client:

One of the largest bottlers and distributors of beverages in the Asia Pacific with over 19,000 employees and revenues in excess of \$4.5b.

Problem:

Using a separate spreadsheet to manually calculate and verify rebates for every customer, leaving little time for analysis, insights and data integrity checking.

Solution:

Streamlined and consolidated process to produce and validate calculations for each customer, allowing staff to focus their time on review and analysis. Did not need to replace staff member who left organisation (saving of a full FTE).

**Before:**

- Each customer rebate calculation taking between 2 hours – 2 days to prepare.
- Separate excel spreadsheet maintained for each customer (>75 spreadsheets).
- Quality of data integrity checks dependent on individual doing the work.

After:

- Customer rebate calculations generated in under 10 minutes.
- Single, consistent rebate model used for all customers.
- Automated data integrity checks to ensure high data quality for every customer.

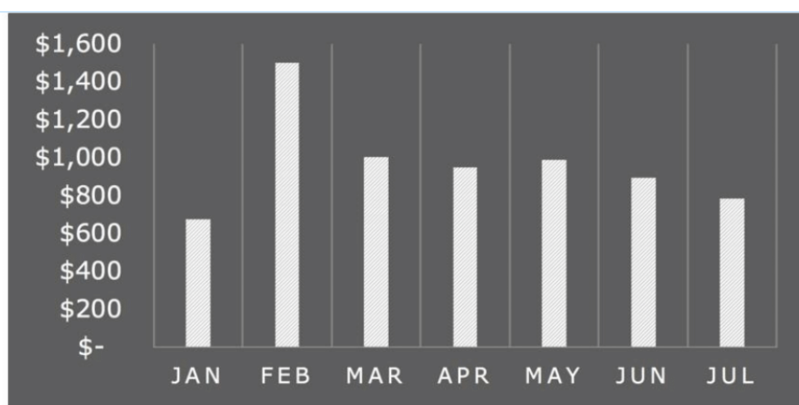
SAMPLE RULES TABLE

CUSTOMER	CUST ID	BEVERAGE TYPE	REBATE
ABC Hospital	13KJ55	SNACKS	12.50%
ABC Hospital	13KJ55	DRINKS	10%
Green Point University	83NS31	SNACKS	12.50%
Green Point University	83NS31	DRINKS	9%
Blue Downs University	44NS32	SNACKS	13.25%
Blue Downs University	44NS32	DRINKS	11.50%
Up Top Airport	21AE33	SNACKS	8%
Up Top Airport	21AE33	DRINKS	15%

Rules table allowing staff to control the rebate rates for each customer from a central location. Also allows for new customers to be added quickly and easily (requiring a new row to be added).

SAMPLE KEY OUTPUTS

Month	Sales	Rebates
Jan	\$ 4,495	\$ 674
Feb	\$ 6,832	\$ 1,500
Mar	\$ 6,683	\$ 1,002
Apr	\$ 6,333	\$ 950
May	\$ 6,251	\$ 987
Jun	\$ 5,732	\$ 893
Jul	\$ 5,243	\$ 786
	\$ 41,569	\$ 6,793



Key outputs: Sales and rebates payable by month for a given customer.

KEY METRICS



SAVING OF 1 FTE DUE TO NOT HAVING TO REPLACE STAFF MEMBER WHO LEFT THE ORGANISATION.



REPLACED MORE THAN 57 SPREADSHEETS AND AN ACCESS DATABASE (WITH VBA).



ROI ACHIEVED IN LESS THAN 3 MONTHS.



DATA PROCESSED AT PRODUCT LEVEL (> 250K TRANSACTIONS EACH MONTH).



REBATES CALCULATED FOR ~100 CUSTOMERS ON A MONTHLY OR QUARTERLY BASIS.

ABOUT SOLVEXIA

SolveXia is an automation, data management and analytics platform used by banks, general and life insurers and other companies. The tool is particularly well suited to complex and specialised processes that are repetitive and would otherwise rely on spreadsheets, Access databases or macros. Users automate processes by configuring a series of drag-and-drop “robots” capable of collecting, validating, transforming and calculating data.

SolveXia executes processes faster (at least 10x), produces more credible and consistent information and enforces transparency and audit controls. By doing so, organisations are more easily able to achieve strategic objectives in areas such as compliance, customer/partner engagement and risk-mitigation.