

Arbela Case Study: JMP

Arbela helps James M. Pleasants Company (JMP) deploy analytical sales insights to their sales organization.



Distribution & Wholesale



Analytics



BI as a Service

The Vision

Create a BI and data strategy that aligns all departments across the organization with strategic business outcomes and KPIs.

Remove all manually generated Excel reports.

Establish trust so that true integrated, workflow drive predictive and prescriptive insights across the enterprise.

Enable a data-driven culture that sets expectation of its data and insights.

The Pain & Ambition

Manually generated and emailed Excel spreadsheets that drove sales reporting.

No ability to easily look up customer insights for sales engineers while in the field -- required calling into customer service to get details.

No true visibility of the sales organization and its "health" as it relates to the desired outcomes of JMP.

Ambition: Desire to remove manually generated Excel reports, and move to proactive insights that sales engineers could take advantage of while being mobile and in front of the customer.

Creating an Agile Approach to Sales Insights

James M. Pleasants Company (JMP) was founded in 1958 as a stocking sales representative for Bell. JMP now has 15 offices in 6 states covering Southeast United States. JMP's mission is to provide their customers with energy-efficient water and steam related products, along with solutions to their hydronic needs.

Martin Messick, Director of IT, took over the focus for JMP in helping to establish why business intelligence (BI) and unleashing data is so vital to the growth of their company. Along with Chuck More, COO, and Jason Clifton, VP of Sales, a heavy focus on empowering the sales engineers in the field with in hand, relevant customer and product insights arose quickly as a requirement.

JMP and Arbela have been working together to create an agile approach to providing specific sales insights that could easily be accessed via Microsoft Power BI mobile.

These insights include:

- ▲ Sales actual vs. goals by key product lines
- ▲ The ability to look into inventory on-hand while sitting with a customer
- ▲ The ability to look up list and specific customer price details
- ▲ Deeper customer engagement including order history and buying patterns