

Play'n'Learn – Case Study

HOW SMETRIC INSIGHTS HELPED A SUPPLIER OF EARLY CHILDHOOD EDUCATIONAL EQUIPMENT MAKE THE MOST OF ITS DATA

Company Background

Play'n'Learn is a well-established business with 14 staff, based in the Kapiti Coast. They import and sell a wide range of quality educational products, focussing on the early education environment.

The Challenges

Play'n'Learn uses a number of different systems to manage their business: Xero, Cin7, HubSpot, Google Analytics and Excel. They wanted to better manage their stock by getting alignment of Cin7 with their website.

They had tried another dashboard system for a year, but it couldn't be automated. Data had to be entered manually to update the dashboards with details of sales calls. Much of it was guesswork. In the end, the team didn't even bother opening those dashboards as they didn't trust the data.

Smetric Insights Solutions

After looking at a number of different options, Peter Rowe, a Cloud Integrator from Beyond Expectations, put David Witty in contact with Smetric Insights. David was impressed by how clear-cut, open minded and creative Smetric were in helping Play'n'Learn. The Smetric team saw opportunities, not challenges, in giving them what they wanted – automated dashboards for strategic information.

The Results

It only took a few phone calls and a Zoom meeting for the team at Smetric to understand what was needed to get on with getting access to their data and creating the dashboards they wanted to see.



They wanted dashboards to cover 7 areas that were key to the business performance.

With the creation of the dashboards, management have found it far easier to hold the staff accountable. The staff have all bought into it and it has created a more positive culture. The dashboards say all they need. They trust the data, it is very transparent, so it removes the emotion. The staff are more productive.

“Smetric has a brilliant team. They are very responsive, on the mark, and great innovators of automated dashboards. The greatest thing about the Smetric team is that they don’t say no! They say anything’s possible! If that’s what you want, we will try it. Then tomorrow morning, there’s a new solution!”

See below for the range of reports they see every day:

Report Selection for KPI's Dashboard



Please click on the report you wish to view

7 Drivers

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Finance

Sales Rep - Report

Marketing


Customer Services


Purchasing

Orders

Warehouse

Customer Analysis

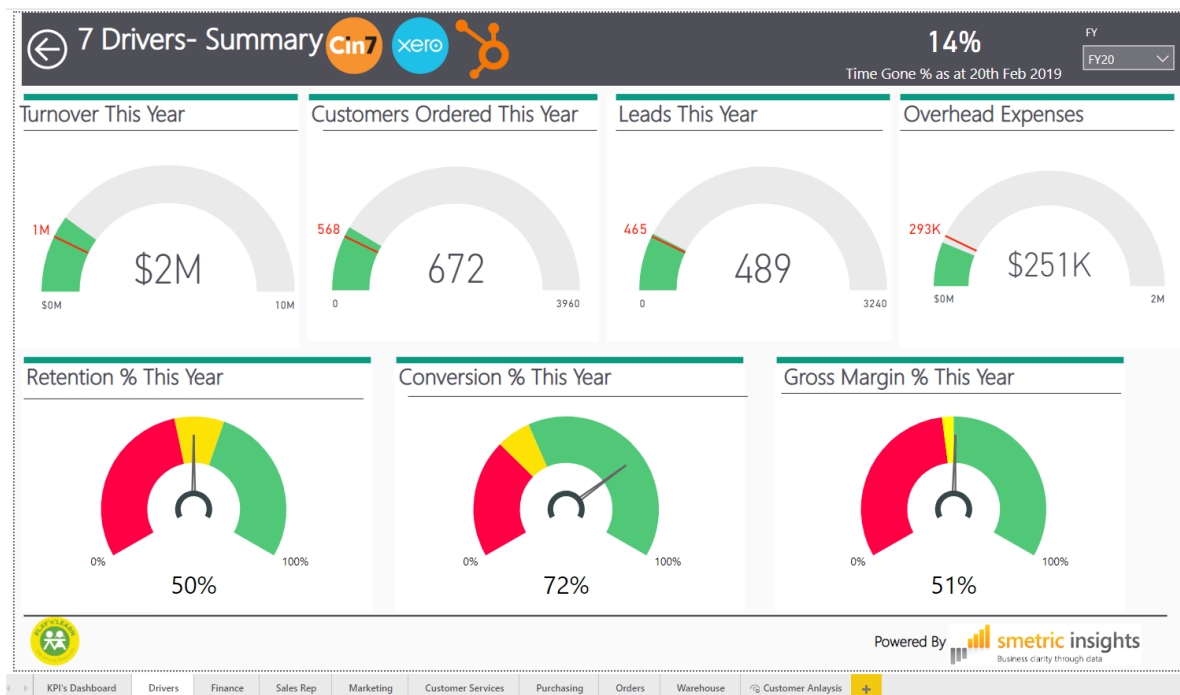


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Business clarity through data

Each report digs deeper. They wanted to check their progress against targets every day, in a simple format. They now have a stand-up team meeting every morning. The team shares one thing they will do that day to make the needle on their dashboard move the right way.

The following dashboards are a sample of what they see on the 7 Drivers Report.





Time Saved, More Buy-In, Happier Team

There are 14 people in the team and by eliminating the manual entry of data, they are each saving at least 15 minutes each day. That's a saving of 4 hours a day, 20 hours a week!

They are now finding more time to do what they do best – not admin! The staff are more productive. Before, the sales team were not updating their calls and visits into the previous dashboards. But now it automatically flows through to the dashboards from the CRM system.

Not only does it save time entering the data, but it makes the team use the CRM system properly. They can't short cut the system, so real success is tracked by the dashboards.

"It's brilliant! Anyone who doesn't have a dashboard is on a path to doom."

As well as saving time, everything is transparent and there is more buy-in by the team. This is resulting in other efficiencies and a much happier team. They have now set up a bonus structure, based on the targets on the dials. They look at it every month and it is very transparent and easy to see how things have gone. They couldn't do this before as they didn't have reliable data so nobody trusted the data.

The Future

They are keen to keep refining the dashboards. They would like to create a few more dashboards as some of the team are not managed by data out of the CRM. They'd also like to see the dashboards better on the phone for the reps who are out and about.

Want to get all your data into one place and automatically updated and in a format that can easily be reviewed for insights and shared? [Contact us](#) today to learn how we can help you.