



# Case Study

RED GOLD: DIGITAL PROCESS AUTOMATION

## The Situation

Red Gold, a tomato processing company based in Indiana, not only produces its own branded products, but also works with companies to create private label tomato products sold under many other brand names.

In the past several years, Red Gold's cross functional team responsible for new label/item creations has been observing problems that increasingly led to delays, frustration, errors, and confusion with no clear path towards the cause. The legacy paper and spreadsheet heavy sales-to-operations handoff process to create and change items for brand and private label products was designed by employees that had long ago left the company, leaving a gaping hole when questions came up. Admittedly, the team knew this process was not scalable to meet the higher volume goals of the business, and they had no hard data to pinpoint where breakdowns were occurring.

This led to management and the team participants in the process feeling frustrated since it was not clear whether the data being used was accurate. Processes were rushed to meet deadlines, leading to extra work on the production floor.

Fingers were pointed with not only no hard data to support the reasons for the delays, but also no path to accountability to correct the errors. Clearly, the team was feeling the pain and decided help was needed to solve these problems.

## The Solution

Since Red Gold had already developed a trusted relationship with Leaf on a prior project, Red Gold contacted Leaf and described the situation. To overcome the frustrations, Red Gold felt that they must move away from the manual paper and spreadsheet-based process towards a more modern solution to be used as the single source of truth. The solution would serve as the basis for continuous improvement for both people and process with standardized data entry, process flow, tracking, reporting, and accountability. With improved communication based on greater visibility among a wider audience, relevant parties would be informed, eliminating guesswork.

As the consultants from Leaf listened and understood the issues, they offered direction on how similar problems were solved with work done for other clients.

They participated in collaborative discussion about user adoption, quick ramp-up time, sensitivity to introducing a whole new set of technology, and the true business value of increasing scalability without increasing headcount. Since data needs have increased for both internal and external stakeholders, it became paramount that the quality of the data about Red Gold products become as important as the quality of the product itself.

With extensive experience with the Microsoft Power Platform, Leaf explained how this offering would meet the needs while avoiding the much higher costs encountered when compared to the other solutions being considered by Red Gold. Developing within the Power Platform would also allow Leaf to quickly implement the solution inside a technology the user base was already familiar with (Microsoft), leading to increased adoption.

Leaf developed a Digital Process Automation tool to replace the paper and spreadsheet model. Sales and Operations now work within a built-in set of business rules, which results in increased visibility and accountability, putting an end to the prior frustration and potential for delays. Accuracy is greatly improved due to the built-in real time validation. Reports are generated with Power BI and distributed to appropriate parties to inform decision making.

## The Results

### User comments have been positive:

- "Change forms make it through the routing process much more quickly, and multiple people can complete their sections simultaneously. Forms are more clearly organized and don't look so overwhelming, which avoids confusion."
- "The new system has been working very well – data entry is easier, the information is more complete, and the built-in error checking prevents me from making mistakes."
- "I have a greater sense of understanding where we are in the process since we now get an automated email every morning showing project status."
- "I have nothing to say but good things about this system which will allow our sales assistants to not only operate much more efficiently and timely, but it significantly decreases the amount of errors that the plant finds."
- "Having an electronic trail with a single location to go to has increased efficiency."

### Red Gold reports:

- Over 75% of the order entry or change request forms that used to take from two weeks to many months are now completed within one day, with almost all forms completed within five days.
- High user acceptance rate, with much less frustration and rush. They like the new process.
- Process improvement data along with reporting brings new levels of accountability to the process.
- Bottlenecks are reduced or eliminated with new visibility if process gets stuck somewhere.

The project has been transformational for Red Gold, as modernization has been adopted, and a template for future process improvement projects has been identified. Based on this success, Red Gold now sees additional processes at Red Gold that would be greatly improved with the same type of automation. Developing on the Power Platform allows for expandability and flexibility without huge expense.

Brian White, Associate Director of IT, stated, "This is a great example of how implementing new technology with a high level of end user involvement leads to improved ownership. Leaf contributed their knowledge and expertise to highlight an area where IT was able to show their value by introducing a tool to solve a real business problem."



## How the Improved Process Impacts and Adheres to Red Gold Core Values

**Superior Quality:** Data quality as important as product quality.

**Outstanding Service:** The improved data accuracy and quality benefits our external customers as well as internal customers and members of the value stream. In addition, timeliness is a key measure of customer service.

**Operational Excellence:** Improved timeliness and accuracy creates revenue opportunities and decreases costs via lower administrative costs and lower manufacturing costs related to rework and rushing.