

Wholesale Order Management & Payment Tracking with Data Analytics

ABOUT CLIENT

- Our client is a leading force in licensed wholesale, operating a multi-channel fulfillment network to streamline commerce for brands and retailers.
- As one of the largest licensed wholesalers in its industry, the client has processed over \$1 billion in transactions across major U.S. states. This privately held, multi-state operator offers an innovative online marketplace for wholesale transactions, combining fulfillment, payment processing, financing, data analytics, and sales and marketing services.
- Recognized in the 2023 Inc. 5000 list of Fastest Growing Private Companies, the company employs over 195 professionals and continues to expand nationally.

PROBLEM STATEMENT

After a few rounds of discussion with our team, the company highlighted multiple challenges in its order management and analysis. Here are the key issues we identified:

Payment Tracking and Financial Visibility:

- The client struggled with tracking payments and maintaining financial visibility.
- Delays in customer payments—often beyond the agreed 90-day cycle—created cash flow uncertainties, making it difficult to manage finances effectively.

Order Tracking and Sales Monitoring:

- There was no streamlined way to track orders from placement to fulfillment.
- The client needed real-time visibility into sales performance, order trends, and product performance to support strategic decision-making.

SOLUTION

Our team worked closely with the client to develop a cohesive solution that addressed their challenges head-on. By integrating advanced analytics and data visualization tools, we aimed to streamline their payment tracking system, enhance financial visibility, and provide profitable insights into order management and sales performance.

Centralized Data Integration:

- Our team collaborated with the client to consolidate their financial and order data from multiple fragmented sources into a single, centralized platform using Amazon Redshift.
- We automated data ingestion processes to ensure real-time updates, giving the client accurate and up-to-date information on payments and orders without manual effort.

Payment Tracking System:

- To address the client's challenges with tracking payments, our developers designed and implemented a system that monitors payment timelines and flags overdue invoices.
- The system sends automated alerts and notifications to the client's teams when payment deadlines approach or are missed, helping them take proactive steps to reduce delays and manage cash flow better.

Real-Time Order and Sales Monitoring:

- Understanding the importance of visibility into order lifecycles, we built a robust solution to track orders from placement to completion.
- Our team added features to analyze sales trends, helping the client pinpoint peak sales periods, understand which products drive revenue, and identify areas needing improvement.

Tableau Dashboards for Actionable Insights:

We worked closely with the client's stakeholders to design intuitive, interactive dashboards that provide clarity and actionable insights:

- **Payment Dashboard:** This dashboard visualizes critical financial metrics, including payment timelines, overdue amounts, and expected receivables, making it easy for the client to monitor cash flow.
- **Sales Dashboard:** Our developers created a dashboard that shows real-time order volumes, sales performance over time, and product trends, enabling better strategic planning.

Forecasting and Reporting:

- We leveraged historical data to build predictive models that forecast future cash flow and sales trends, ensuring the client stays ahead of potential challenges.
- Automated reporting schedules were configured to deliver regular updates to stakeholders, eliminating the need for manual report generation and ensuring that decision-makers always have the latest insights.

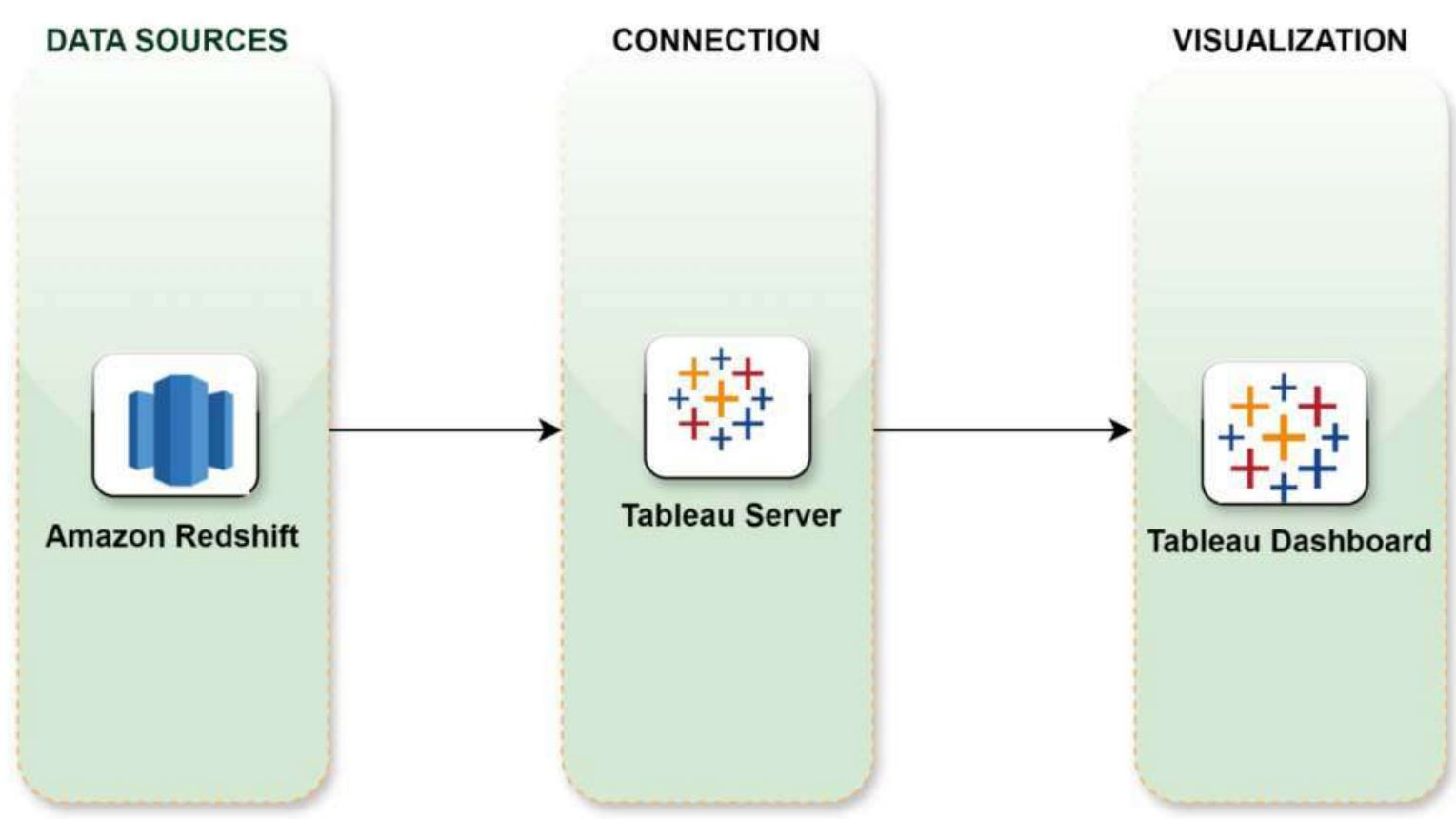
Scalable and Optimized Architecture:

- To ensure smooth performance and prepare for the client's future growth, our team optimized the database architecture by implementing partitioning, compression, and sorting techniques in Amazon Redshift.
- We also set up secure, seamless connections between Redshift and Tableau Server, ensuring that the client's dashboards reflect the latest data without delays or interruptions.

Continuous Improvement and Support:

- Post-implementation, we provided ongoing support to monitor system performance and gather feedback from the client's teams.
- Based on this feedback, we identified opportunities for further optimization, ensuring the solution evolves alongside the client's needs.

TECHNICAL ARCHITECTURE



BUSINESS IMPACT

Smoother Payment Cycles:

Real-time payment tracking and automated alerts led to a 30% reduction in overdue payments, improving cash flow and follow-up processes.

Better Sales Visibility:

The solution increased order visibility by 25%, enabling the client to track sales trends and product performance effectively.

Faster Insights, Faster Decisions:

Automated Tableau dashboards cut report generation time by 40%, accelerating decision-making and operational efficiency.

Scalable System Performance:

Optimized data structures in Redshift improved query execution speed by 50%, ensuring seamless performance as the business grows.

High Adoption Across Teams:

User-friendly dashboards achieved a 90% adoption rate, empowering stakeholders with easy access to insights while reducing manual efforts. Overall, our implemented solution architecture (being scalable) in their current workflow ensured continuous support of the client's growing needs, allowing them to focus on what they do best—empowering brands and retailers through seamless commerce solutions.

Industry

Consumer Goods

Services Used

- Business Intelligence (BI)
- Data Analytics
- Digital Transformation
- Tableau

Region

North America

Function/Department

- Accounting and Finance
- Financial Planning and Analysis (FP&A)
- Operations Management
- Sales and Business Development

Engagement Model

Managed Analytics