

# Isolite Systems

## CLIENT SUCCESS: BUSINESS INTELLIGENCE

### SNAPSHOT



Better Isolation = Better Dentistry®

### ORGANIZATION

Founded in 2001, Isolite Systems is a medical device manufacturer that specializes in dentistry. Its innovative products help dental professionals work more effectively by facilitating better control of the oral environment. Company headquarters are in Santa Barbara, California.

### CHALLENGE

Automate and streamline the process of gathering and presenting information to support data-driven decision-making. Resolve performance issues with SAP ERP system.

### STRATEGY

Use Microsoft SQL Server Reporting Services (SSRS) to create a BI solution that gathers real-time data from Isolite's SAP Business One system, cleanses it, and presents it in interactive web-based reports and dashboards. Perform in-depth analysis of the ERP system to determine the root cause of poor performance.

### RESULTS

Critical business information is now automatically presented to managers and staff via user-friendly interactive dashboards and reports. Users can drill down into reports to obtain more granular information. The ERP system now performs optimally.

*Isolite® Systems is a medical device manufacturer offering products that help dental professionals work more productively and effectively. Its isolation mouthpiece and illumination technology make dentistry easier and safer. The company generates a significant amount of raw data as it markets its innovative products to a worldwide customer base. But until recently managers and staff had a difficult time turning that data into meaningful information. Manual reporting processes were time consuming and cumbersome. Financial data, sales data, and other operational information was difficult to access and interpret, and it did not consistently reflect the most current state of the business.*

Directors at Isolite wanted to make it easier for the user community to access this information to help them manage sales, marketing, operations, and financials. They sought a technology provider that could deliver a business intelligence (BI) solution that would deliver real-time views of company activities. And they desperately needed help resolving performance issues with their ERP system, which locked out users for minutes at a time, severely undermining productivity.

Management had previously engaged Visus LLC's development division to create a content management system (CMS) that transformed the way the company interacts with its customers. The success of that project led them to return to Visus and work with their BI Division for help with these pressing BI and system-optimization projects.

*"The approach Visus takes with projects is very methodical, logical, transparent, and collaborative. They keep us apprised of everything they are doing, with updates at each phase of the project. Working with them is a joy."*

*– Sandi Hirsch, CEO and President, Isolite Systems*

*"The team from Visus did an excellent job of understanding our business and delivering a solution based on our needs," says Sandi Hirsch, CEO and president at Isolite Systems. "The Visus solution improves our business by providing user-friendly reports on demand so personnel can take action quickly. Visus also fixed a serious problem that had plagued our ERP system for months. That repair saves us an estimated \$10,000 per month in lost productivity."*

### Multi-Faceted Solution Improves Productivity Throughout the Company

Developed using Microsoft SQL Server Reporting Services (SSRS), the new BI solution gathers data from Isolite's SAP Business One system, cleanses it, and presents it in interactive reports and dashboards. Interactive graphs and charts make it easy for people to understand the information, and visualize it at a glance. They can filter the data and drill into details about specific products, regions, time ranges, and more.

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The Visus team delivered four distinct projects for Isolite as part of the BI engagement: revenue and unit plan report, ad hoc analysis services database, sales dashboard, and system optimization.

“Visus anticipated our current and future needs even better than we did. The team identified potential to help our business even beyond what we initially envisioned.”

– Sandi Hirsch, CEO and President, Isolite Systems

The **Revenue and Unit Plan Report** automates a critical monthly sales revenue report and extends its usefulness with filtering and drilldown capabilities. Previously senior officers were tasked with manually gathering sales data from the ERP system, manipulating the data, sorting it, totaling it, and entering it into Excel spreadsheets. This monthly process was so burdensome that in some cases the report was not generated at all.

According to Hirsch, the Visus solution saves at least a half day each month by automating the delivery of this fundamental business assessment. Users can view sales revenue by year-to-date, month, SKU or item number. They can break that down into different groups and drill down to individual territories. “Being able to parameterize the data makes the report more valuable,” she says. “Visus has transformed the report into a critical management tool.”

The **Ad Hoc Analysis Services Database** allows sales and marketing professionals to manipulate data, search for trends, and quickly get answers to their questions. Data-savvy personnel use this database to manipulate and analyze financial data. The multi-dimensional database that Visus created contains measures such as sales metrics and attributes of orders and invoices. It extracts data from Isolite’s SAP database nightly.

Advanced users use the tool to spot trends in monthly orders. They can easily evaluate a product line in a certain territory over a specified date range. This helps them determine where they need to spend their time with the existing customer base. “The ad hoc analysis tool is fantastic,” Hirsch says. “It provides answers in seconds.”

The **Sales Dashboard** presents real-time metrics for sales reps. The dashboard summarizes sales data and presents it

in visually appealing graphical form. A combination of bar charts, composite column charts, line charts, KPIs and color-coding present sales information on a large wall-mounted monitor in the sales department.

Additional reports provide detailed information to increase transparency and highlight sales opportunities. Sales reps can drill into the data to study particular orders, determine where sales originate, and more. For example, quintile reports help reps manage customer relationships by grouping customers based on revenue generated within a certain period. Using this information, sales reps can prioritize activities to service high-value accounts.

“The Visus solution enables our managers and staff to access user-friendly self-service reports when they need them instead of referencing dated figures from the last raw data dump that the IT department supplied. We’re making smarter decisions based on better information.”

– Sandi Hirsch, CEO and President, Isolite Systems

“The sales dashboard and sales detail reports represent completely new functionality for us,” Hirsch says. “The solution motivates the sales team, increases transparency, and highlights opportunities for our sales reps. It has created a great atmosphere and camaraderie among our inside sales team.”

Finally, Visus **analyzed performance issues with an SAP ERP System**. Previously the system regularly froze, preventing people in every department from performing their duties. It was costing the company thousands of dollars each month in lost productivity and missed opportunities. After conducting a thorough analysis, the Visus team isolated the problem.

“The experts from Visus were very competent,” Hirsch says. “They quickly identified the problem with our system and put a workaround in place. We could see the difference immediately.”

## Careful Planning Delivers Measurable Business Benefits

Hirsch summarizes the success of the engagement. “The

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Visus team was quick to grasp the importance and priority of different pieces of information and why they are critical for our business," she says. "They also helped us see potential that we had not even considered. Our managers and staff can now make intelligent decisions based on real-time business metrics. The new BI system makes us more productive and positions us for future growth."

"Our ability to provide more information has made it easier to manage our team and to encourage them towards their results. It has increased transparency for the team and boosted the morale of the company."

– Sandi Hirsch, CEO and President, Isolite Systems

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