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Data Diving with Lipman Brothers

While beverage wholesalers aren't known for their technical prowess as an industry, there are a number of technology platforms available to distributors who want better insights into their business. Nashville-based Lipman Brothers is the largest wine and spirits wholesaler in Tennessee, which recently began allowing wine sales in grocery stores. It's a franchise state, and Lipman operates in three out of four areas, covering 75% of the state. It's also the fastest-growing distributor in Tennessee.

IT administrator Susan Adkins gave a presentation at the WSWA Convention about her company's use of Diver and Program Advisor, two data analytics offerings from Dimensional Insight. I spoke to Adkins at the convention about those tools and how they help manage Lipman Brothers' data.

Susan Adkins: I work in the IT department as a Diver Administrator and data analyst. So I maintain the program and send out reports internally and to suppliers. But I also manage our incentive programs and provide financial insight to managers. Diver and Program Advisor have a lot of bells and whistles, and they can track any program a supplier might design.

Beverage Wholesaler: For people in the industry who aren't familiar with Dimensional Insight, how specifically do these programs help wholesalers?

SA: Diver takes everything in your database and puts it into models you can "dive" into using any parameter – customers, products and history are just a few. It slices and dices the data in any way you can think of. It's a quick way for managers to see in the morning where they stand for the day and how they're progressing through the month to meet their goals.

I use Diver personally to do all my reporting, including our pricing lists. You can tailor it for any dimension like certain suppliers, varietals or types of beer. It's very customizable, so that my dashboard might look different from someone else's even though we're using the same program.

Program Advisor tracks incentive programs. So sales representatives and managers can use it to see what their goals are, how many cases they've sold and how many we need to sell to get to goal. Each rep has their own dashboard, and each manager can see their entire team.

BW: What databases is it gathering that information from?

SA: It's tracking our ERP system, which has sales data, as well as our warehouse management program and our ordering program. It's a business intelligence tool, so it can combine different sets of data and analyze them.

BW: Was getting the initial buy-in difficult when you started using Program Advisor in 2013?

SA: Setting everything up and loading in the data was the easy part. It took a while because we had so many programs going, but we did have some difficulty getting sales reps to buy into it because it was new. No one likes change. But we had a lot of meetings and demos and slowly they started seeing how they could use it to increase their incentive payouts. Once they figured that out, they came around.

BW: How do you track how much it's increased efficiency or revenue over the past 4 years?

SA: Anecdotally, I can say that before Program Advisor a lot of incentive programs fell by the wayside. No one knew they were there. Now it's visible and everyone can see every program they're qualified for and more are being participated in and met. Before Program Advisor, half the programs were met and half weren't. Now a lot more are met, and only a handful aren't paid out. Our total dollars paid out is a lot higher – it's increased incentive payouts to the sales reps, which has increased sales and increased our ability to meet supplier goals.

