



Case Study:  
**BOISSET FAMILY ESTATES**

**Achieving Actionable Insights**  
from Sales and Inventory Data

"Diver provides us with the key metrics required to gain actionable insights and operate our business with agility and efficiency. Diver reports are interactive, letting users sort, explore and visualize their data in ways that make sense to their job role. Diver displays dozens of key metrics and data views spanning Inventory, Shipments, Depletions and Retail Account Data."

*Matthew Fidge, Business Analyst, Boisset*

### Quick Facts:

**Organization:** Boisset Family Estates

**Industry:** Beverage Alcohol

**Established:** 1961

**Location:** St. Helena, CA

**Customer since:** 2007

**Solution:** Diver Platform

**Website:** [boissetcollection.com](http://boissetcollection.com)

### Company description:

Boisset is a leading family-owned winery focused on fine, terroir-driven wines.

## AN INNOVATIVE LEADER IN THE WINE WORLD

From humble beginnings in 1961 selling wine door-to-door in Burgundy, France, Boisset Family Estates has grown into a leading producer of luxury and historical wines on two continents. Recognized throughout the industry for organic and biodynamic farming, exceptional passion for fine wines, and dynamic winery experiences, Boisset was also a pioneer in adopting innovative eco-friendly packaging. With products distributed in 80 countries and in every US state, Boisset owns several preeminent wineries, including DeLoach Vineyards, Raymond Vineyards, Buena Vista Winery, Domaine de la Vougeraie and several leading estates in Burgundy, Beaujolais and the Rhone Valley.

## ADOPTING A BUSINESS INTELLIGENCE SOLUTION

As an innovative wine producer, Boisset realized that in order to become a data-driven organization they would need to deploy a business intelligence solution capable of providing powerful, self-service reporting and analytics to their sales team. Patrick Egan, Boisset's Director of Marketing explains how Boisset elected to purchase the Diver Platform™ (Diver): "When Boisset launched their search for a business intelligence platform, [we] specified several key requirements that had to be met. The BI solution had to be easy to use, capable of providing superior data handling capabilities, and guaranteed to deliver

accurate results. Additionally, the selected vendor had to be well-established in the beverage alcohol industry."

With over 20 years of experience providing analytical and reporting services to the beverage alcohol industry and with over 100 wineries, distilleries and importers using Diver, Dimensional Insight emerged as the winner. Available as a convenient SaaS-based monthly subscription, Dimensional Insight saved Boisset the hardware expenses and other startup costs associated with a traditional on-site deployment.

## GAINING VISIBILITY INTO KEY METRICS

Matthew Fidge, Business Analyst at Boisset, goes on to explain the information that Boisset captures and analyzes: "Diver provides us with the key metrics required to gain actionable insights and operate our business with agility and efficiency. Diver reports are interactive, letting users sort, explore and visualize their data in ways that make sense to their job role. Diver displays dozens of key metrics and data views spanning Inventory, Shipments, Depletions and Retail Account Data."

**Inventory:** Accurately aligning available inventory with projected demand is a key requirement for wineries. Keeping too much inventory on hand increases storage costs and may result in shelf life issues, especially for white wines. Too little inventory can result in stockouts and unhappy consumers and even can jeopardize a brand's reputation. Boisset uses Diver to track the number of days of inventory for both



in-house inventory and distributor's inventory. Diver reports also display value totals for in-house inventory and users can filter inventory data views by item and brand group. This reporting and monitoring results in better inventory cost control and stocking levels.

**Shipments:** Boisset uses Diver to track shipments down to the SKU level. Diver lets users view shipment data compared against distributor goals as well as by geographic region. Detailed comparison gives Boisset timely insight into distributor performance and product demand.

**Retail Account Data (RAD):** Dimensional Insight partners with the Beverage Data Network (BDN) to provide access to RAD directly from Diver's interactive reports. In addition to retail, the data provided to Boisset encompasses all accounts, including on/off premise and military bases. Diver users can select one or more distributors by state and see the accounts they have sold. To provide context for the data, case sales by account are displayed relative to last- year-to-date and against rolling 12 month windows. Users also can view chain sales and key account sales by month and get a breakout of sales by license type. Diver's ease-of-use enables Boisset to efficiently analyze RAD data and gain insights into sales performance across all channels.

**Depletions:** Depletions reports keep Boisset informed about which SKUs are turning over fastest at their distributor's warehouses. Diver reports show depletions by distributor, year-to-date versus goal, and depletions by month. Analysis of these timely reports enables Boisset to more effectively monitor depletions and reduce their depletion allowance expense.

While Boisset's sales team members are the primary users of Diver, marketing also uses the tool to facilitate and guide product promotions, brand performance, and conduct business analysis. Additionally, Diver is used by customer service to answer questions regarding which retail outlets stock their products.

#### BENEFITS:

- Empower the sales team with self-service access to information reporting and analysis, delivered to each user based upon their individual responsibilities.
- Achieve a macro view of the company enabling them to focus beyond the shipments side of the business.
- Manage brands, varietals, geographies, distributors, and accounts at a micro level by drilling down to the lowest level of available detail data.
- Guide the business with data-driven decision-making.
- Reduce their depletion allowance expense.
- Run the business better by discovering the cyclical nature of market demand.
- Foster an organizational culture of data inquiry and exploration with key information that is more accessible.

With accurate, timely visibility into key sales and inventory metrics, Boisset continues to grow as an innovative, modern, data-driven organization.

To find out how Dimensional Insight's business intelligence platform provides beverage alcohol suppliers with unprecedented visibility into sales and inventory data, visit:

<http://www.dimins.com/beverage-alcohol/>



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## About Dimensional Insight

Dimensional Insight is the leading provider of integrated business intelligence and performance management solutions. Our mission is to make organizational data accessible and usable so everyone from analysts to line of business users can get the information they need to make an informed, data-driven decision.

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