Baylis & Harding Accelerates Growth Through Greater Business Visibility

Industry
Based in the UK, Baylis & Harding is a wholesale distributor that specializes in world-class toiletries and gift sets that can be found in all major and independent resellers.

Challenges
Baylis & Harding needed to give managers and executives greater visibility into financial, customer, and sales data to help them make better decisions and expand the business.

Solution
The Phocas business intelligence solution allowed managers and executives to easily create standard and ad hoc reports based on NetSuite data.

Results
Baylis & Harding executives and managers now have instant access to the business data they need to proactively influence business success, rather than having to react to issues when it’s too late.

Phocas and NetSuite Deliver the Business Visibility that Enables Baylis & Harding to Grow Rapidly
Baylis & Harding is on a mission to create high-quality, exquisitely packaged toiletries and gift sets for men, women and children at affordable luxury prices. This unique selling proposition has propelled it to phenomenal growth. It has become the fastest growing company in its niche with products that can be found in one out of every two households in the United Kingdom.

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—Andy Taylor
IT Manager, Baylis & Harding

Company at a Glance:

Location:
Worcestershire, United Kingdom

URL:
www.baylisandharding.com

Phocas
Keep It Simple

Partner Name:
Phocas

Location:
Coventry, United Kingdom
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IT Manager, Baylis & Harding

No organization can improve what it can’t measure and Baylis & Harding is no exception. Its success is a direct result of its long-standing commitment to accurately track and report on a wide range of sales and financial key performance indicators (KPIs). For the last eight years, the company has used the Phocas Business Intelligence solution to enable end users to take information from its financial ERP solution and create custom dashboards and reports far more easily than they could with the previous ERP system.

“We initially selected Phocas because it’s a user friendly tool that allows managers and executives to produce meaningful reports on the fly,” said Andy Taylor, IT Manager for Baylis & Harding.

Five years ago, the company replaced its legacy financial ERP with the NetSuite ERP solution. “We chose NetSuite because we were looking for a cloud-based application that was easily accessible and reduced the costs of internal support. Additionally, NetSuite takes big business functionality and makes it available to small and medium-sized businesses, providing them with a very feature-rich application,” said Taylor.

The company uses NetSuite ERP for Financials, Customer Relationship Management (CRM), as well as sales order and purchase order processing. It has continued to use Phocas with NetSuite ERP because of its flexible and easy-to-use reporting capabilities. “Phocas does reporting really well. That’s why we stick with it,” said Taylor.

Intuitive Reporting Makes Managers and Executives Self Sufficient

Using Phocas, managers and executives throughout the organization can create regular and ad hoc reports themselves instead of having to request them from IT. “Phocas gives users a visual, drag-and-drop way to develop complex reports rather than requiring them to write scripts and SQL commands to extract data from the ERP. You don’t need to know anything technical...just the fields you want to report on,” said Taylor.

The organization has a great deal of flexibility in creating reports and dashboards that allow managers and executives to see important information and key performance indicators (KPIs) at a glance.

For example, the customer services manager has created reports and dashboards that help quickly identify the value and quantity of sales by customer, by product and by month.

Sales directors can see the daily total of invoices and orders by month and by period (e.g. current financial year, June to December, and January to May). The same report also compares actual results to budget, to the previous year’s sales as well as to sales from two years ago. The sales director can drill down into the details to see under- and over-performing sales representatives, customers, and products.
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The commercial manager can compare last year’s invoices (i.e. sales) to this year’s by customer, as well as drill down to see the average price paid per product and average product margins. He can see sales by region and country. And he can look at actual performance by customer account versus budget for the current fiscal year and drill down to see performance via sales rep.

**Greater Visibility Enables Proactive Response**

With this information, the company has gained considerable visibility into its business performance. “It allows us to be proactive and influence the business rather than having to react after the fact when it’s too late,” said Taylor. “For example, by using reports and dashboards to monitor their sales into individual accounts, we can track sales reps’ performance in meeting various objectives, and if necessary take corrective actions. We can also use this data to upsell and cross sell products.”