OPERATIONAL INTELLIGENCE

THE SMART WAY TO RUN YOUR BUSINESS

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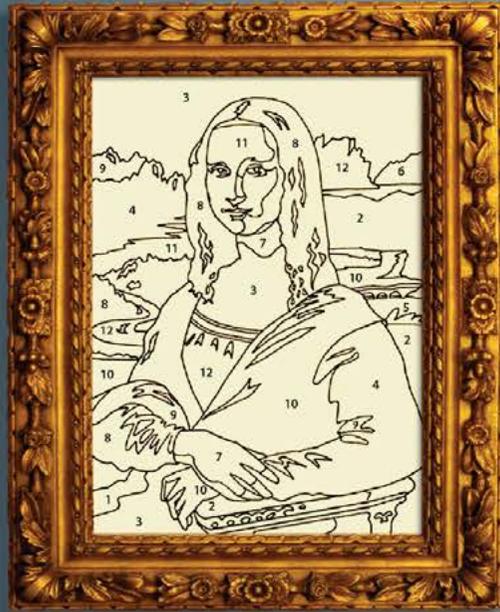
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CONTENTS

"Operational Intelligence is as close to a silver bullet as most businesses are going to get.

Peter Dickinson, CEO, Greentree International

WHAT IS
OPERATIONAL INTELLIGENCE?

Operational Intelligence (or OI) isn't a buzzword. While people tend to make it fit with their own definitions (or use it because it makes them sound clever), OI is something every business should be striving to have.

OI is about tapping into data and business processes to change actions in real-time across the entire fabric of your business. It's about using information to streamline processes and make sure there are no gaps or cracks in how your business operates.

It uses data you already have

Working towards OI doesn't necessarily mean collecting vast swathes of new data. It can simply mean accessing and applying "intelligence" to the data you already have. Rather than having to go and find the information you need, data will be delivered as and when you need it – based on built-in alerts and triggers that sit right across the system.

It empowers your people

Undoubtedly people are the most important part of any business – but people aren't perfect. They're good at creativity, innovative thinking, and communication, but not so great at dull repetitive tasks or at holding critical business IP in their heads.

OI helps your people by removing the drudgery, making their work quicker, easier and more accurate. It also triggers the next step in the process, not just for you, but for everyone who needs to be involved.

No one is left wondering what to do next, no sifting through data or compiling spreadsheets – the right information, data or step is delivered to the right person at the right time. And the alerts and triggers can continue to be refined so that every role can target optimum effectiveness.

All of that intelligence is captured in your OI systems, so it's not buried in your organisation. That captured intelligence can then do the grunt work, so your people can get back to what they do best.

Think of it as if you were a fighter pilot: OI acts as your "heads up" display, delivering the information you need, as you need it, to make the right decisions and take the right actions.
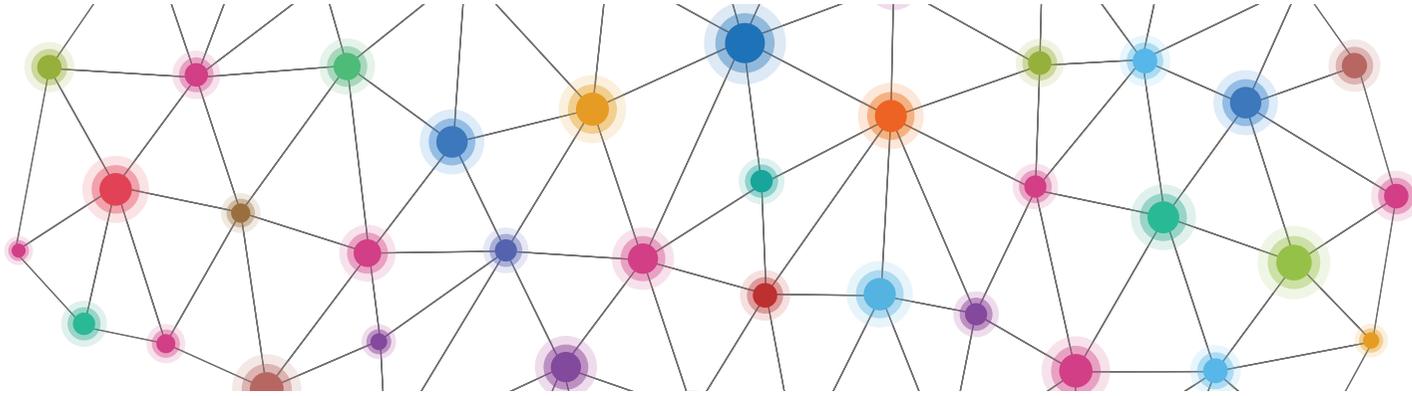
To do that, OI seamlessly connects the dots from every process in your organisation, whether they're performed by people or systems.

Systems:
- Taps into data and business processes to change actions in real-time
- Uses information to streamline processes
- Makes sure there are no gaps or cracks in how your business operates

People:
- Flags immediate actions and decisions needed
- Enables effortless communication between departments
- Dishes up the information you need, exactly when you need it
- Records IP so it stays within your organisation

DEFINITION:

Operational Intelligence (OI) is a category of real-time, dynamic, business analytics that delivers visibility and insight into data, streamlining events and business operations. Organisations can then make decisions and immediately act on these analytical insights, through manual or automated actions.

WHY DO I
NEED IT?

OI can benefit any business. It improves effectiveness and makes staff happier, by simplifying their jobs and removing a lot of the drudgery – not many operational changes can say that.

Here are some other potential benefits of OI:

- **Better data, smarter decisions.** With the up-to-date information you need at your fingertips, it's much easier for you and your staff to make smart, savvy decisions in the day-to-day business operations.
- **Connecting the dots.** Break down silos and help departments work more efficiently, while making it easier to identify issues and highlight areas of growth and change.
- **Quick smart.** Get work done faster and smarter across the business by automating as many processes as possible.
- **More with less.** The necessary information is delivered to the right people at the right time. You get faster decisions, fewer errors and a higher rate of productivity.
- **Instant response.** Identifies unauthorised events or critical conditions the instant they occur and automatically triggers an alert so the issue can be immediately addressed.

- **Continuous improvement.** Adjust the alerts and triggers as you review and improve your business processes. This also ensures your systems keep pace with business change.
- **Accurate, reliable results.** Remove room for human error so work is accurate and reliable. Fewer errors and do-overs saves time and money, creating happier, more loyal, customers.
- **Taking the pressure off staff.** Take over unpleasant grunt work – like manually processing orders or inputting data. This frees up staff to focus on the more complex work they often enjoy more.
- **Coping with change.** Keep things ticking along when staff go on holiday or leave altogether – your business will run smoothly and retain critical business IP as things change.

PUTTING THE OI
INTO ROI

Improved productivity, staff morale and customer experience all lead to one thing; a 'slam-dunk' ROI! They are amongst those business intangibles we all want to achieve but few systems can deliver. This is now all within reach if you can capitalise on your OI:

If you need your people to be good at:
- Creating opportunities
- Communication
- Innovative thinking

Then you don't want their days filled with:
- Dull repetitive tasks
- Mindless administration
- Fixing mistakes

Bruce Rayment, Managing Director of Australian industrial product importer Halifax Vogel Group, puts it like this:

" Greentree enables all of our people to make better decisions every day. The system itself makes it easy for our staff to provide accurate inventory information to our clients when they make inquiries on the phone, or to our sales force in the field.

The order flow throughout the business is paperless, and so any of our staff are able to see at any time where a particular order is up to."

UNDERSTAND THE DIFFERENCE
AT A GLANCE: OI vs BI

" With BI you will know that OI is working.

**David Sankey, CEO,
Addax Business Solutions
(Greentree Partner)**

Business Intelligence (BI) and Operational Intelligence (OI) are often linked – and even more often confused. While they do share some commonalities, they're actually quite distinct.

Operational and Business Intelligence both rely on data to help businesses get to grips with large amounts of information – but they do it differently. Where OI works with real time data, even as it's changing, Business Intelligence analyses trends that occur in your data.

OI is about what you do

OI is all about optimising day-to-day functionality. It manages activities and functions as and where they occur. The processes you automate and the information OI provides will vary depending on what your company does. It helps you to automate and manage highly complex business processes and very simple ones – effortlessly and effectively. Some examples might be:

* Integrating software programs so staff aren't forced to repeatedly enter the same data,
* Reordering stock when it drops below a set level, without a key stroke having to be made,
* Instantly alerting your sales team when a customer has fallen behind in payments

* An automated reminder when a service call is due – to both staff and customers

What you apply OI to will depend on what makes sense to your business.

BI identifies trends

BI is designed to deliver intelligent forecasting and planning. Because it offers the ability to create complex trends analysis, BI offers up analytics for forward planning that OI can't. Essentially, BI and OI are complementary, rather than conflicting. OI streamlines everyday functions, backed up by the in-depth analysis of BI.

Usually, if a business wanted to take advantage of both BI and OI functions, they would need to use two different pieces of software – or an add-on to their main programme. That's where Greentree is different. OI is integral to Greentree, no matter how you're using the system. And when it comes to BI, Greentree offers Greentree IQ (powered by QlikView) that is part of the same fully integrated ERP system.

Operational Intelligence

- Works in the here-and-now with real time data
- Manages activities and functions as and when they occur
- Streamlines your operation by connecting the dots
- Stops errors from being made
- Is used right across your entire organisation

Business intelligence

- Works with established data; as it occurs or reaching back into history
- Uses data for forecasting trends and planning
- Provides in-depth analysis for better decision making
- Focuses on the longer term
- Typically used by managers or those in analytical roles

You can have one without the other, but you need both to be truly competitive.

" The quality of information that our managers and staff were able to get from Greentree IQ* was of such a level that the business benefits of it were enormous. It enables us to manage our inventory better, to analyse customers' sales patterns and purchases, and to analyse product movements ... very accurately. It's been a massive improvement to the business."

Bruce Rayment, MD - Halifax Vogel Group

*Powered by QlikView

HOW DOES
OI WORK?

OI is not something you buy – it's something you do. You're not going to get OI simply by upgrading your software or training staff; OI requires a fundamental shift in the way your business runs.

The first step towards OI for most businesses is integrating systems. That can mean making your current software systems work together, or moving to a fully integrated business management system, such as Greentree.

Obviously, because it's designed for the purpose, a fully integrated system is going to be more useful. Everything you need to achieve for OI should be built into the fabric of the system so you can make continuous, incremental improvements across all your areas of operation.

Developing your OI will ensure:
- IP is captured right across your organisation
- The next steps in a process are automatically triggered
- The right information is delivered to the right person – every time
- All the dots are connected across your business – no more silos
- Gaps and cracks disappear – eliminating errors
- You use the information you already have to make day-to-day work faster, easier and more accurate
- Everyone is able to focus on adding value; not repetitive manual tasks

Boosting OI can be an easier mission than you think and it could be the best thing you ever did. Instant, intelligent access to the data you need to do your job is a game changer. Once you have it, you'll wonder what you ever did without it.

OI WORKS FOR
ANY BUSINESS...

INTERAUST FOODS

Interaust wholesales over 300 different products in Australia, and only represents food and beverage manufacturers who are both internationally accredited and leaders in their fields.

"We feel that the system is there to help us, rather than us being told what to do by the system...I'd say we're light years ahead of where we were. We're now doing things that make for a better customer experience, and we're happy that we've been able to simplify our processes."

Tony Fraser, Financial Controller, Interaust Foods Pty Ltd
Learn more ››

TRANSNET

TransNet offers a large range of products to the electrical distribution, transmission, rail, OEM and wholesale industry, with four stocking distribution facilities in Australasia.

"Making us more efficient is definitely a big part of what Greentree offers because all these processes are now handled in the one system. With integrated Greentree IQ*, half a day's work can now be done in a couple of minutes."

Ed Cheeseman, Managing Director, TransNet
Learn more ››

ACME SUPPLIES

ACME Supplies Limited is the exclusive New Zealand importer and distributor of major international brands of quality office products and hand tools.

"It's a great tool. We can see what sales orders need to be picked and dispatched at any time. It takes the guesswork out of what's outstanding or what extra resources are needed to fill the orders for the day – it's all on the screen in real-time."

Brent Stanton, Finance Manager, ACME Supplies Ltd
Learn more ››

OF ANY
SIZE...

ANDY'S EARTHMOVERS

With a fleet of over 300 earthmoving machines, Andy's Earthmovers is renowned for providing high quality rental equipment throughout Australia.

"I no longer have that constant error-checking between systems and I now spend more time analysing the data and making decisions where I can add value...Despite the fivefold increase in business, our administration staff have not grown in numbers to the same degree."

Lisa Wills, CFO,
Andy's Earthmovers
Learn more ››

DOUGLAS GROUP

Douglas Group administers pharmacies in various parts of Australia under several different brands, tailoring services to suit the communities they serve. It accesses a specialist SaaS hosted version of Greentree.

"I would need another two full-time staff members doing that process work if we didn't have Greentree. This frees me up to analyse the data and quickly fix the problems at a store level that need fixing...It's given us the power not only to expand and grow, but also to fix problems before it's too late."

Lyn Guy, Financial Controller,
Douglas Group
Learn more ››

AUSTRAL FISHERIES

Austral Fisheries is one of Australia's largest integrated commercial fishing companies. It has interests in both deep-sea fishing and at-sea prawning. It has opted to Cloud-host its Greentree solution.

"This is a very competitive business that requires tight control of working capital and good customer service... (With Greentree) there's no double entry and one integrated system gives senior executives access to live and timely results, so business performance is constantly maintained."

Greg Johnston, CFO and Company
Secretary, Austral Fisheries
Learn more ››

FROM ANY
INDUSTRY.

NATIONAL CARWASH

National Carwash Solutions is a national leader in car wash solutions and services for dealers across the USA. Greentree has made value-added services possible, such as "customer report cards" and a customer reward scheme.

"First of all we have real-time information, so once a job is completed I know instantly whether we've made money on it or not… (then) when customers want to know how much money they've spent to date and where they've spent it, we have that at our fingertips."

Bill Ferguson, VP (Operations), National Carwash Solutions
Learn more ››

CONCERN UNIVERSAL

UK-based charity, Concern Universal works in partnership to challenge poverty and inequality with practical actions that enable people to improve their lives and shape their own futures.

"We needed pro-active visibility from the source, …that everyone could access, wherever in the world they were, and know that it was up-to-date information. Most importantly, by centralising our systems, Greentree helps us spend more time improving the lives of people in poverty."

Viv Mair, Systems & Services Co-ordinator, Concern Universal
Learn more ››

STRUTT & PARKER

Strutt & Parker was founded in 1885, and has grown to be one of the largest property partnerships in the UK, offering services in all aspects of property. At any one time they are managing GBP 19 million of client funds.

"The 'gross domestic product' of an individual employee increases… less people doing the same output. You end up charging less to your clients, so what you're actually doing is maintaining an operational competitive advantage over others."

Shaun Spalding, Head of Client Finance, Strutt & Parker
Learn more ››

HOW DO I
GET IT?

> **"** We want our customers to get the very best outcomes and applying OI where we can, is going to achieve that.
>
> **Ian Garvey, Managing Director, Prerogative (Greentree Partner)**

With an integrated, OI-based ERP system, you'll see many of your business problems resolved – and you don't need a whole raft of specialist consultants to do it.

First you need to identify what drives your business; the issues you're trying to resolve and the outcomes you want to achieve. This will help you determine the actions and processes you need to establish so that your OI system can be effective.

The good news is that the 80:20 rule really does apply here. If you start with your biggest pain points (the 20%) you'll see a significant improvement straight away.

Working through the remaining 80% can happen over time, with documented improvements as you go. Often, as you automate your major business processes, many of the more minor issues will resolve themselves. For example, if you fix a delivery issue for your major customer by default you're likely to fix it for everyone else.

It will also become apparent which staff members are effectively disengaged – you'll clearly spot any high error rates, dropped balls or missed communications. Once identified, these previously hidden issues are generally easily fixed and both staff morale and productivity improve.

There are very few business improvements you can make that are going to give you the results that OI can. It should drive improved results across the board, while still enabling you to work the way you want to. The important thing is to get started.

WHAT YOU NEED TO
GET STARTED?

Your business is unique, so to deliver OI to your business, your Greentree ERP and business management system will be too.

Greentree is fully integrated, so you've ticked the first box – all your departments will be able to share data and talk to each other across the system. It is so inherent in what Greentree does that there are a large number of our customers that already have a high level of OI without actually putting a label on it.

While there is no prescription to what OI looks like, there are a couple of essential building blocks:

Workflow
A workflow desktop gives you a real-time snapshot of key business information at your fingertips. Create multiple "desktop views" that provide immediate visibility of key business information across the system. Information can be selected, re-routed and "drilled into" for immediate access to key data.

Approvals and Alerts
These make sure your critical transactions, documents, or records are automatically monitored and approved by the right people. You'll be able to set tolerances for things like missed deadlines or other criteria – it then sends out alerts when these limits have been hit, or exceeded.

Business Process Management
Provides the opportunity to not only manage your processes but the ability to fully automate them. Deliver consistent, controlled results, no matter who is involved in the process, with the ability to improve and refine those processes as you go.

Some businesses also find useful:
eDocs
It's never been easier to code, approve and reconcile your accounts and other documentation – simply convert documents like expenses records into executable electronic files.

Purchasing these modules is only the first step to making your business operationally intelligent. What you also need is someone to help you connect all the dots across your organisation, close up any gaps and cracks and deliver the real-time intelligence you need.

WHO CAN HELP ME
TO GET OI?

The Greentree Partner community is expert at helping clients develop and deliver OI. It is as much a part of what they do, as it is part of the Greentree system.

They understand that while every business will benefit from OI, not every business is ready for it...so there are no pushy sales pitches. What you will get is a considered process and the best outcome possible.

While your business pains might be obvious, working out how to fix them may not be as difficult as you think. Greentree Partners work with you to do this as a matter of course and can bring in specialist industry expertise from our wider Partner network when it's needed.

Implementing any business management system is a serious undertaking. Our clients routinely see an exponential return on investment with real OI. If that's something worth considering for your business, get in touch for an exploratory phone call or email.

At the end of the day OI will give you visibility of what your business is actually doing, as it happens – and who doesn't want that?

Connect with a Greentree Partner today to understand if your business has the OI it needs

Connect Now ››
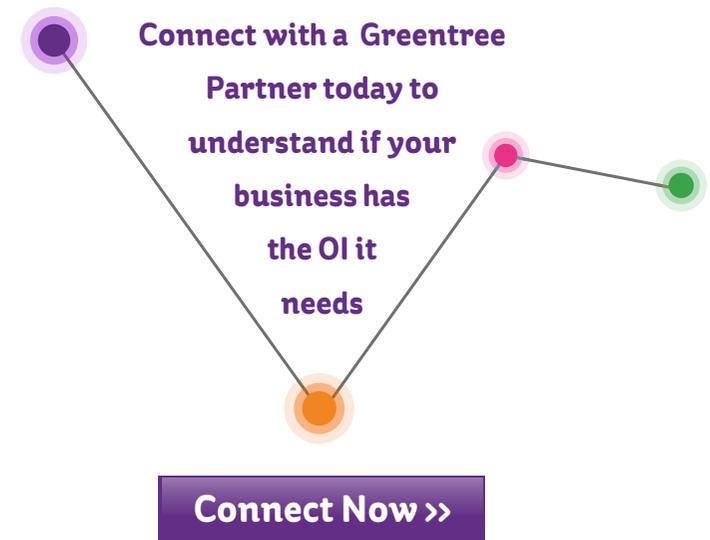
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