pentaho

PENTAHO FOR RETAIL

## Retail Industry Challenges

Retailers work with many channels, departments, and geographies to manage their stores, merchandizing, supply chain, and customer relationships. Understanding what appeals the most to their loyal customers, what attracts new shoppers, and seasonal and demographic trends, adds to the complexity of retail planning. As a result, retailers need greater visibility into their customers, product sales, and suppliers to improve their financial performance and maximize profits.

## Pentaho Retail Solution

With Pentaho, retailers can manage their operations, marketing, merchandizing, supply chain, and finance, all in one solution to ensure all parts of the organization work well together. Pentaho Business Intelligence enables retailers to:

- Build an intelligent supply chain that responds to production and demand signals
- Segment markets and understand customer buying behaviors
- Implement market-driven pricing and promotion strategies
- Closely watch operations, monitor controllable costs and capital spend
- Ensure consistency between field execution and corporate strategy

> "We're delivering enterprise-wide applications, and continuously improving our ability to use technology to benefit our business, while reducing and containing costs by using proven commercial open source software from leaders like Pentaho."

– SPECSAVERS
*UK's Most Trusted Optician with 2000+ Stores*

### CUSTOMER SPOTLIGHT

A leader in catalog and merchandizing company, The Swiss Colony wanted to measure the effectiveness of its online marketing activities. Integrating click-stream data with Google Analytics and sales activity could no longer scale with their homegrown application. Using Pentaho, Swiss Colony was able to gain greater visibility into website traffic, ad and keyword performance, and its direct attribution to revenue and profits.

The Swiss Colony

"Pentaho's BI suite and top-notch professional support enabled us to deliver a successful, high-value BI solution at a much lower cost than would have been possible with the expensive, proprietary alternatives."

– THE SWISS COLONY
*Leading Catalog and Internet Merchandising Company*

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# Merchandize Planning and Supply Chain

Merchandizing planning is needed months in advance to procure stock. However, supplier capacity and customer demands change all the time. Adjusting to seasonal trends adds to the unpredictability of these plans. Optimizing merchandize levels, minimizing out-of-stock and managing inventory levels, will ensure that goods are moving through, shelves are stocked, and profit targets are met. Pentaho BI suite Enterprise Edition enables merchandizing managers to:

- Balance supply and demand to meet customer needs
- Improve inventory turnover and reduce markdowns
- Minimize out-of-stock categories and align merchandize levels to sales targets

# Sales and Marketing

Allocating top-down marketing dollars and ensuring the effectiveness of marketing ROI requires a thorough market basket analysis. To identify best product placements and promotional mixes, marketing managers need real time visibility into customer demand signals, such as "point of sales" transactions and "web click-thru" patterns. But disparate operations and a multi-channel sales model means disparate data. Pentaho BI suite Enterprise Edition enables retail marketers to:

- Understand sales patterns and product line performance
- Create promotional campaigns that are aligned with customer buying behaviors and seasonal trends
- Design profitable up-sell and cross-sell offers by analyzing the success of past offers

# Store Operations and Corporate Finance

Store operations are at the core of retail — whether it's a storefront or online. P&L (Profit and Loss) analysis ensures that individual store plans are in-line with corporate targets. Store level financial plans establish sales and inventory goals, as well as labor and controllable expense budgets. At a corporate level, multi-channel operations require more control. Comparing performance across stores and departments can ensure a productive use of future capital. Pentaho BI suite Enterprise Edition enables store managers and corporate executives to:

- Monitor key sales and cost metrics to ensure store profitability
- Compare sales and labor expense to plans to ensure expense control
- Identify and address under-performing stores, channels, and employees

## CUSTOMER SPOTLIGHT

A leader in food retail, Sheetz needed to correlate and analyze store level sales with company-wide operations. Using Pentaho, Sheetz has been able to roll out self-service reporting and analysis to their business users across all departments.

"The Pentaho BI suite allows our technology and business users to get the data they need to perform analysis and standard reporting... Pentaho has provided us with the support we needed to install and implement quickly."

– SHEETZ
*$4.9B U.S. Retailer*



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