SWISS VALLEY FARMS ENHANCES SALES AND PRODUCTION PROCESSES WITH QLIKVIEW

Overview

Swiss Valley Farms is a cooperative owned and controlled by approximately 620 dairy producers. Headquartered in Davenport, Iowa, the company was founded in 1958 and has nearly 400 employees and over $400 million in annual revenue.

Swiss Valley is known for its premium, award-winning specialty cheeses. It also produces whey products, pasteurized process cheeses, cold pack club blends, enzyme-modified cheeses and cheese analogs. The company works with a wide range of both national and international customers, including manufacturers, distributors and marketers to fulfill their industrial, food service, retail and private label needs.

Background

Swiss Valley Farms wanted greater insight into two key areas of its business: cheese production and sales. The company had a business intelligence (BI) platform in place, but it was not producing the level of insight the company required. From a cheese perspective, the company wanted a tool to document processes from when raw milk comes in from the farm to when cheese leaves the factory. It is a complex operation, with six distinct processes and over 100 data points.

Within the sales organization, Swiss Valley Farms required more insight into typical sales challenges. The company wanted to better understand how salespeople performed relative to the forecast and view margins and margin percentages for certain products and customers by salesperson. Another goal was to compare current performance to the same time period in previous years and also make quick comparisons between current monthly and yearly sales and the forecast. Ultimately, Swiss Valley Farms wanted to hold sales staff more accountable to projections.

“With technology today, you can’t afford to have all the expertise you need on staff. You must have people outside of the company you can trust and call upon as needed without much notice to help solve specific technical challenges. RSM is that reliable partner for us.”

– Tom Stontz, Vice President of Administration, Swiss Valley Farms
“We needed a tool to bring data together from diverse sources, and quickly and intuitively evaluate a wide range of variables,” said Tom Stontz, Swiss Valley Farms vice president of administration. “With the data gathered from these sources, it is very important to be able to go back and analyze results, and what factors may have caused variations.”

**Project**

Swiss Valley Farms chose RSM to implement a new BI platform, based on a longstanding relationship and nearly 20 years of successful projects. The RSM team demonstrated the QlikView platform with a prototype utilizing Swiss Valley Farms’ key information and metrics, and the company saw the potential for deeper insight and analytics through the system.

“When we identified a need, we thought of RSM immediately,” commented Stontz. “After the team presented the QlikView reporting tool, it seemed like the perfect answer for what our people were looking for.”

**Enhancing production processes**

The long relationship with Swiss Valley Farms helped the RSM team target key data sources and develop analytics to improve the production process. These were designed to help the company understand what factors (such as temperature, specific enzymes and pH level) directly correlate with cheese quality to make improvements. The QlikView solution helps plant operations personnel recognize any issues and quickly make adjustments.

RSM also utilized QlikView to implement enhanced lot tracking for Swiss Valley Farms. For example, the company can track milk from a specific silo and determine what cheese it was used in. In the case of a potential recall, the company can quickly target products that include specific ingredients or enzymes. The company must perform mock recalls, and products can now be targeted instantaneously instead of taking hours previously.

In addition, the QlikView platform allows Swiss Valley Farms to account for the good byproducts from the milk, including whey, cream cheese and butter fat. The mechanisms allow the company to track individual components and ensure the total milk components in the various outputs are commensurate with the inputs from the raw milk.

The system also helps the company understand where batches fall within target data point ranges. These analytics allow the company to measure quality in the production process. The same concept applies to measures of variance which are indicative of a process that is under control.

The RSM team worked closely with the Swiss Valley Farms’ operations staff to identify the key data points throughout the production process. The two groups worked together to determine which data points to collect, how they should be analyzed at each stage and how to capture and communicate them. The lowest and highest acceptable levels for many metrics were established to clearly illustrate where individual attributes lie.

RSM helped Swiss Valley Farms develop charts to understand how consistently they meet target levels and detail the elements that go into specific product grades. In the past, employees had thoughts about what may cause issues, but through QlikView, employees can discover the correlation between data points and help ensure consistent, high-quality products.

“QlikView has given our management much more visibility into the possible interplay of all of the variables that can occur when developing a complex product,” commented Stontz.

The RSM team utilized several sources to build analytics and data, sourcing information from Swiss Valley Farms’ enterprise resource planning system, production machines, lab equipment, manual input and spreadsheets. Those sources are fed into the QlikView platform to use in charts and tables to visualize the information. Following implementation, additional data points were identified, and RSM deployed its application development team to create forms to capture the necessary information.

“From my perspective, the real-time nature of the information is a very big plus,” said Stontz. “The ability to have everything in one place is also a tremendous benefit. We now have one version of the truth without having to call IT for a standard report that does not include the level of ‘what ifs’ that we have now.”

**Increasing sales insights**

The RSM team worked with Swiss Valley Farms’ vice president of sales to build and validate a set of key analytics. After determining the necessary information, RSM utilized QlikView to deploy a dashboard with high-level data and information, as well as pages that include deeper data relative to individual members, customers and products. The information is secure and salespeople can view only their information and customers, their forecast components and their customers’ accounts receivables.

QlikView provides more accurate tracking tools for salespeople to know how they are doing relative to forecast, as well as for management to manage personnel expectations better. Swiss Valley Farms has more insight into sales, including if a customer has stopped or started purchasing a product. This depth of information was not available in the company’s previous BI platform and helps assist in forecasting and decision-making.
RSM and Swiss Valley Farms worked together to optimize the QlikView platform to ensure the correct analytics were in place and providing the right data. After the system was deployed, RSM trained Swiss Valley Farms’ staff, and then transitioned to a support role to implement new functionality and refine the platform. The RSM team continues to enhance the system with additional data and input from the vice president of sales and the company sales force.

"RSM has exposed us to new technology and best practices that they see at other clients, recommending things that we may not have picked up ourselves," said Stontz. "Their experience and breadth of their client base helps us make better technology decisions."

**Outcomes**

RSM’s QlikView implementation has provided Swiss Valley Farms with a much higher level of insight into several areas within the business. The platform has helped the company encourage greater alignment with sales projections and also enhanced production processes. With more analytics, Swiss Valley Farms’ award-winning products have remained at a high-quality level, and the ability to make better business decisions has improved its bottom line.

"RSM has helped us embrace technology that would cost much more money if we had to do it internally," said Stontz. "That has made us more cost-effective and efficient."

Other benefits of RSM’s QlikView implementation included:

- More control over the production process through enhanced visibility
- Expanded lot tracking capabilities to identify specific shipments more efficiently
- Ability to make quick adjustments based on insight from new data points
- Increased accountability for salespeople related to projections
- Improved margins due to stronger production and sales processes