

"We have had a great experience with RSM. You don't have to explain things to them; they understand how our business runs and what our issues are. They have given us a lot of good information and insight on our programs and what we can do, and explained it in a way that everyone can understand."

Lou Veneziano, Chief Financial Officer, Nickerson Corporation

## CASE STUDY: DATA ANALYTICS DEEPENS VISION FOR SCHOOL EQUIPMENT AND BUILDING LEADER

Nickerson Corporation leverages data for better decision-making

### Overview

Nickerson Corporation is a privately owned company that provides furniture, equipment, design and construction services for schools in the New York and New Jersey markets. The company is headquartered in Bay Shore, N.Y., and has grown to four offices after over 60 years of providing students with safe places to learn and grow.

### Background

Nickerson utilized Microsoft Dynamics SL to run its operations and generate data and reports. However, when the company had to upgrade Dynamics SL, those reports would not transfer over without a major undertaking. In addition, the company was so reliant on one employee to generate reports, that if that person left the company, all the reporting knowledge would be lost.

"We want to be independent, but if anything ever happens to him, we have no help," said Lou Veneziano, Nickerson's chief financial officer.

Furthermore, as Nickerson continued to grow, the company needed more insight into operations to help guide future decision-making. The company sought more extensive analytics into whether it was growing in the right areas, and where it could take advantage of trends and develop further efficiencies. In addition, a better analytics platform could help the company target and address inconsistencies within projects.

For example, a vendor may give two sales reps different price points on the same project. Enhanced analytics would give Nickerson the ability to quickly identify those issues and gain clarity from the vendor in time to correct any issues.

### Project

RSM has a longstanding relationship with Nickerson, with a successful history of IT infrastructure and technical consulting services. Nickerson was exposed to Microsoft Power BI in some

fundamental reporting prototypes from the infrastructure team, and the company became interested in its potential. At the time, the company had standard reporting capabilities, but nothing that drove insight or truly helped to navigate the variables in its operations.

The RSM data analytics team conducted business intelligence (BI) discovery discussions with Nickerson executives to understand any existing insight and reporting gaps. The two companies worked together to develop a plan to leverage Power BI for reporting and analytics, based on Nickerson's specific business processes. The platform could provide the insights the company was trying to obtain, with more extensive data analytics capabilities as the company grows.

"We worked with the Power BI group to integrate our existing reports, so we have them if anything happens," commented Veneziano. "Once we got in there, we found out that there was a lot of other information that we could utilize."

The Power BI platform has revolutionized how Nickerson can analyze profitability and quickly make adjustments to projects. The company now has more visibility into the current state of projects, so it can adapt to increasing costs, as well as more awareness if a project is not in line with budget projections. In addition, Nickerson can drill down into granular detail, viewing profitability by county, division and even by salesperson.

Understandably, Nickerson sales representatives are interested in the details of their orders and the backlog of sales. Previously, the only way to assess that information was to log into Dynamics SL. The company gave sales some access to the system, but it never felt completely comfortable with the solution because of several potential issues.

"A Power BI report for the salespeople was one of the first things we developed with RSM," said Veneziano. "With this solution, they cannot go in and manipulate information and view everyone else's sales. However, they can easily go into Power BI and see their specific activity."

Power BI also enables Nickerson to look into the sales pipeline to evaluate vendors and view specific facility analytics. The company can assess cost surges based on a specific project or salesperson and more closely evaluate drivers for key operational decisions. These could include which counties are more profitable and how vendor pricing is trending, as well as material and labor costs.

With the solution deployed in Power BI, Nickerson can also take advantage of artificial intelligence features. If stakeholders want to look at projects on the road, they can utilize chatbox functionality to generate comprehensive dashboards on their

mobile phones, with on-demand project details. For example, the company can view analytics related to projects it did well on in a given year and ones that may have had potential issues. Users can generate dashboards on anything that is top of mind.

While the built-in analytics is the foundation of the Power BI solution, Nickerson also now has more ability to perform self-service analytics as well. If the company is looking for something that is not in the existing dashboards, it has the functionality available to develop those insights themselves, without involvement from IT or RSM.

Nickerson plans on taking advantage of further functionality within Power BI in the future, including annual projections. Every time the company gets a purchase order, it becomes a job, and Power BI is very helpful to develop a projected margin for each job.

"We have hundreds of jobs on the books," said Veneziano. "Instead of going through each one, I can see a full report and manipulate it as necessary. It will eventually help us to streamline and enhance annual forecasting for the company."

## Outcomes

RSM has provided Nickerson with a comprehensive Power BI solution that provides more business insight and analysis to guide company decision-making. The company now has an effective analytics foundation, with new visibility into key business drivers across the organization and the ability to more efficiently identify issues and opportunities. While the built-in reports and analytics are a significant benefit for Nickerson, the company still has the independence to create new reports within the platform as needs arise.

Key benefits of RSM's Power BI implementation for Nickerson include:

- Self-service analytics with intuitive report authoring to help end users create their own reports without relying on IT
- A 360-degree view of the business with insights anytime and anywhere
- Job profitability visibility at multiple levels including by products and geographic locations, as well as by sales representatives and managers
- New alert capabilities to notify stakeholders if projects fall outside of expectations in real time
- Profitability data in real time and opportunities to reinforce budgeting policies upon their sales team
- Ability to extend analytics capabilities as needed by adding data sources such as CRM in the future of the solution

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**+1 800 274 3978**  
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