

Move to Snowflake Streamlines Financial Reporting for Fast-Growing Coffee Company

Industry

Consumer Goods & Services

Technologies

- Snowflake Data Cloud
- Microsoft Azure Cloud
- Microsoft Power BI
- SQL Server
- Xenial POS System

Solution

- Cloud Migration
- Snowflake Data Cloud
- Microsoft Power BI for Analytics

Stakeholders now access near real-time insights across 400+ stores; IT easily tracks cloud usage for internal cost allocations

Even during the pandemic, a regional coffee company's customers flocked to its stores. Drive-through orders flourished, and the company maintained its impressive growth trajectory.

Behind the scenes, however, internal stakeholders struggled. Despite implementing a new Xenial point-of-sale (POS) system across its more than 400 locations, the finance team lacked current, accurate data for decision-making. The company's aging on-premises Microsoft SQL system was unable to handle the data load.

The IT team reached out to Pythian for support. With limited internal resources and minimal cloud expertise, the company needed an experienced partner. Pythian worked directly with finance to identify business requirements and with IT for technical requirements, then recommended a new data warehouse platform for analytics to replace SQL Server. Once historical data was migrated to a new POS system and new integrations were complete, Pythian migrated the organization's data to the cloud and configured the platform to scale for future growth.

The company's new Snowflake Data Cloud, hosted on an Azure cloud, complements its existing Microsoft infrastructure. This modern technology easily pulls data from the current and historical POS systems to feed financial reports in Microsoft Power BI. Finance now accesses data at numerous levels, in near real-time, while IT can track cloud usage for internal cost allocations.

Challenges

The coffee company struggled with:

- **Aging infrastructure.** Data growth from its 400+ locations outpaced the capabilities of its on-premises Microsoft SQL Server database.
- **Time-consuming, manual reporting.** To aggregate POS data, finance staff resorted to unwieldy Excel spreadsheets that could take up to two weeks to compile.
- **Limited IT resources.** The internal team knew a cloud solution was the answer, but with only a handful of team members and minimal cloud expertise, the IT team needed an experienced partner.

Solutions

Pythian worked with the company to deliver:

- Strategy and recommendations. Pythian facilitated a collaborative workshop with finance and IT stakeholders to identify and prioritize business needs, then helped select the right platform.
- A modern cloud solution. A Snowflake Data Cloud hosted on an Azure cloud complements the coffee company's existing Microsoft infrastructure. Pythian created a flexible data model, then migrated and normalized data from two POS systems.
- Pipelines to current and historical data. The finance team now accesses near real-time store performance data through Microsoft Power BI, and directly from Snowflake, based on each analyst's skills and needs.

Cumbersome financial reporting hampers decision-making

Within the coffee company, both finance and IT recognized the issues: the existing SQL Server-based system could no longer handle the amount of data generated by the new POS system. Finance analysts needed to focus on interpreting reports, not importing data into giant spreadsheets.

The company needed a simpler, faster way to analyze store performance, and that meant migrating to a modern cloud platform and robust data warehouse.

Unfortunately, the internal IT team lacked the staff resources and the cloud expertise to lead the project with confidence. The team turned to Pythian for strategic guidance and hands-on implementation.

Modern Snowflake solution provides fast and detailed insights

Pythian began the engagement with a collaborative workshop with both finance and IT stakeholders. This facilitated session uncovered a number of must-have requirements, including:

- Demand for near real-time data insights
- Compatibility with Microsoft Power BI
- Cloud usage tracking and ability to chargeback costs to various departments
- Plug-and-play simplicity to reduce the complexity for internal staff

Based on this information, Pythian provided a decision-tree to help this client select the right platform for its needs. A Snowflake Data Cloud, hosted on an Azure cloud, rose to the top. These technologies leverage existing Microsoft tools, allowing users to continue working with familiar components like Active Directory for user controls. Snowflake's design was attractive for its powerful capabilities without extensive custom setup, especially since the coffee company did not have an in-house database administrator.

Pythian then created a flexible data model and migrated historical sales data from the company's previous and current POS systems. Together, these data sets spanned over 400 locations across 11 states in the U.S. Pythian's engineers worked with the coffee company to normalize and transform the data to its most usable format.

As the finance team began using the data, both through the Power BI application and direct exports from Snowflake, Pythian listened and fine-tuned the platform to meet the company's end users' precise reporting needs.

Results

The coffee company can now:

- **Conduct near real-time analyses.** From company-wide overviews to store-by-store performance and even line-item order details, finance can measure all aspects of the business to analyze trends with current and historical data.
- **Track cloud usage and chargebacks.** IT now has the ability to create virtual data warehouses for independent sizing, resource allocations and chargebacks to various departments.
- **Expand easily for future growth.** Snowflake and Azure give the coffee company a scalable platform with nearly unlimited capacity for data analysis.

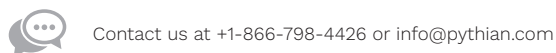
Finance and IT focus on core tasks, not manual workarounds

After just six months, the Snowflake Data Cloud already stores more than a half billion POS records for analysis. Finance loves the dramatically simplified reporting process. Instead of consuming days (or weeks) of manual work to compile data for analysis, the team can make decisions with near real-time data.

Analysis is far more flexible, thanks to the robust processing capabilities of Snowflake and Azure. Finance can review performance across the entire company, look at individual locations, and even aggregate and filter data at the line-item level of drink orders. This granularity will fuel smarter business strategies going forward.

IT likes the platform's ease of use, which frees the limited team resources to meet other demands. The IT organization can now set up virtual data warehouses in Snowflake, which lets team members monitor activity by users and departments, and charge back cloud computing costs accordingly.

While the in-store and drive-through sales keep soaring, Snowflake, Azure and Pythian have put this coffee company in the fast lane for future growth.



ABOUT PYTHIAN

Founded in 1997, Pythian is a global IT services company that helps organizations transform how they compete and win by helping them turn data into valuable insights, predictions and products. From cloud automation to machine learning, Pythian designs, implements and supports customized solutions to the toughest data challenges.

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