

From Grape to Glass: Tackling Winery Reporting & Business Intelligence Challenges



endsight 





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Challenges From Registration

Thank you for submitting your challenges? There were a lot of commonalities.

1. Data silos across multiple systems are causing inconsistent reporting.
2. We're spending too much time manually cleaning and reconciling data.
3. Our systems don't communicate, making it hard to track key metrics.
4. We have issues with integrating financial data across sales and operations.
5. IT feels like we're running a too much of the winery on Excel



What else?



David Smith
CFO

- Entered the wine industry in the early 2000s
- Worked at four different wineries
- Served as CFO at 3 of them
- Oversaw finance, accounting, IT, and wine operations
- Now helps businesses with process reengineering

The Grape to Glass Challenge



Multiple Disparate Systems Across the Value Chain



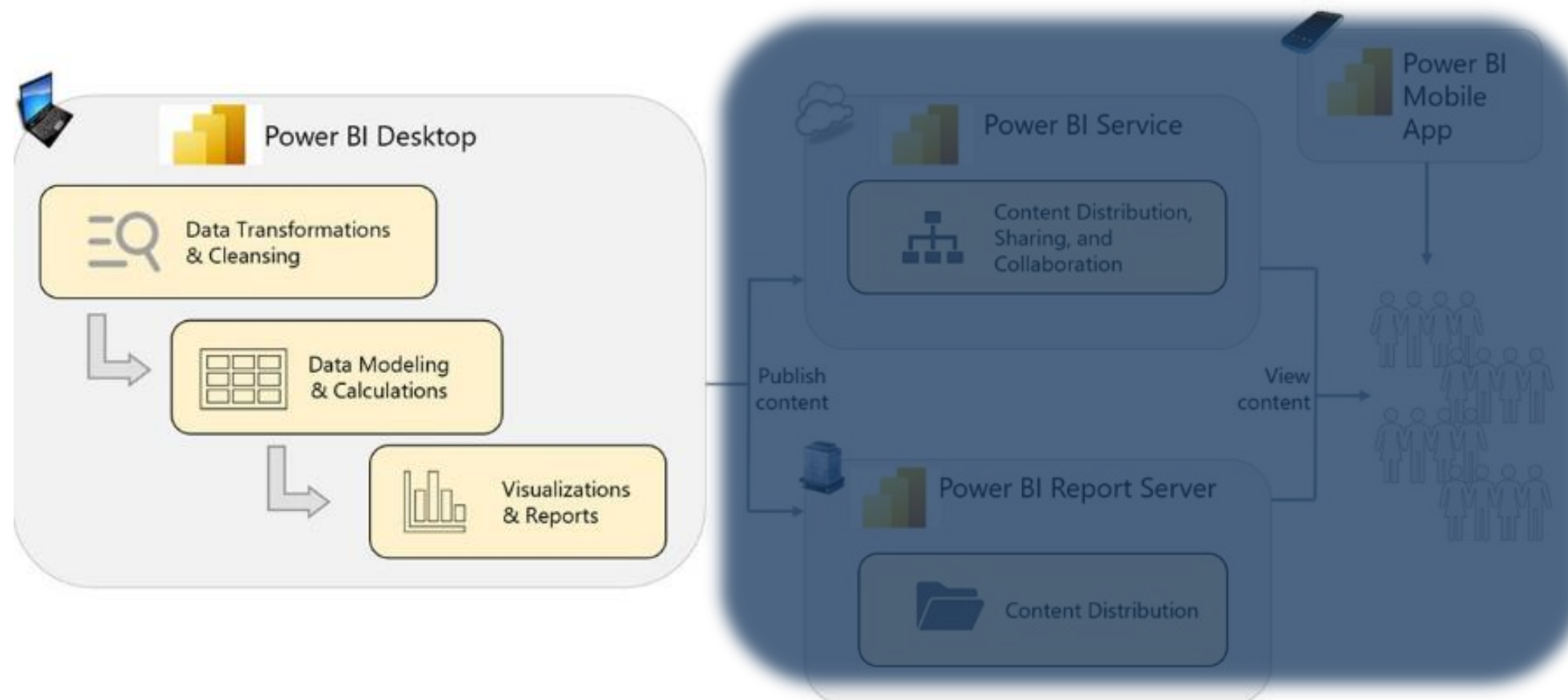
- **Data Silos** cause fragmented reporting.
- Teams attempt to mitigate this by inefficiently spending time **manually consolidating data**.
- This causes **lack of insight** for decision makers, who are hindered by the inability to get a unified view of the business, leading to
- **Poor Decision-Making** as leaders are forced to make business decision on less than complete, or often conflicting, data.

Solution: Data Visibility (Single Pane of Glass)

Cross-Platform Reporting with Power BI

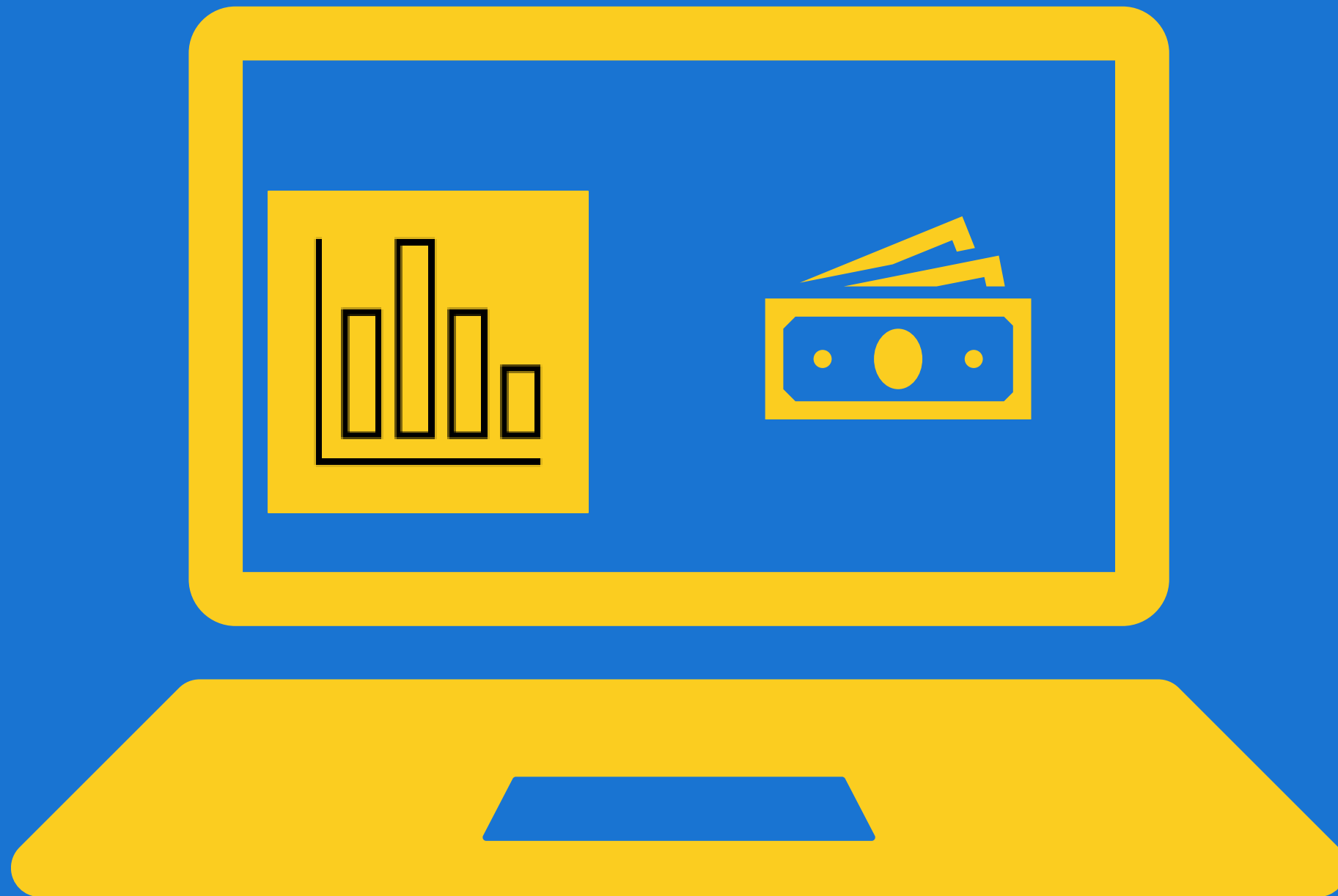
Making the Data Connection

- Data Transformations
- Data Modeling and Custom Calculations
- Visualizations, Reports, and Dashboards



Power BI integrates data across platforms, creating a comprehensive, real-time view across your entire organization; from grape to glass. This unified view enhances decision-making and operational efficiency

Financial Planning, Analysis & Reporting Is Perceived as Just a Finance Problem



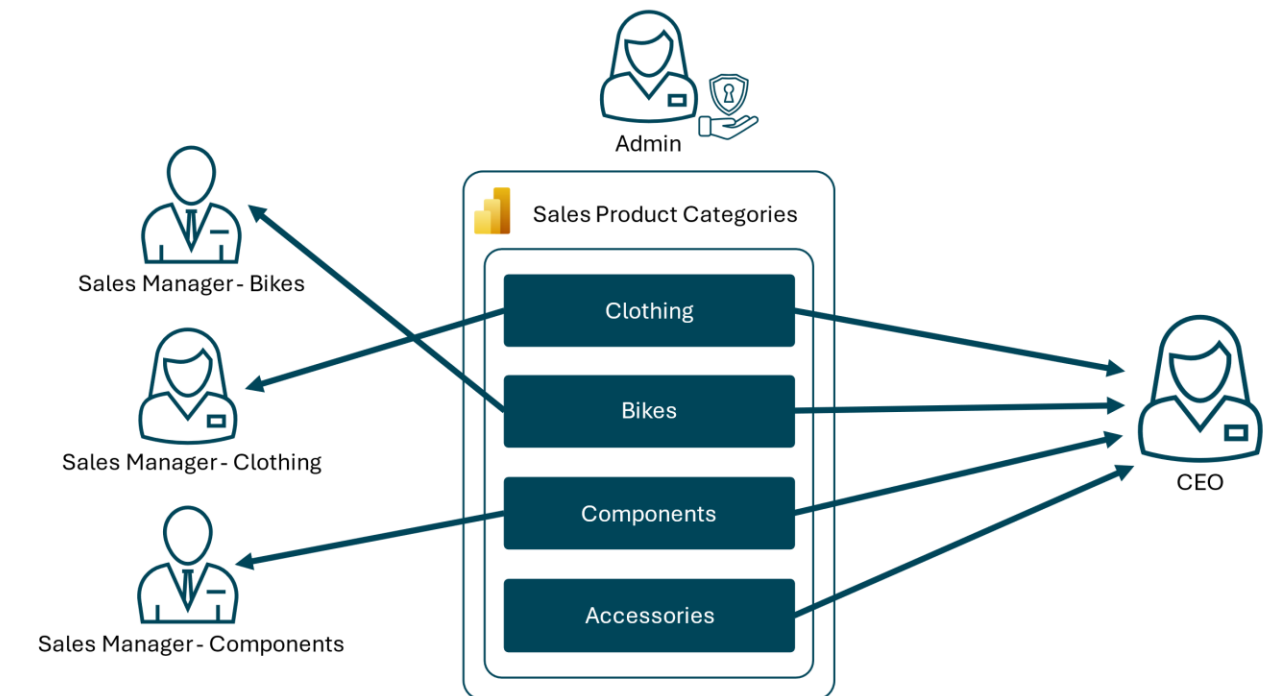
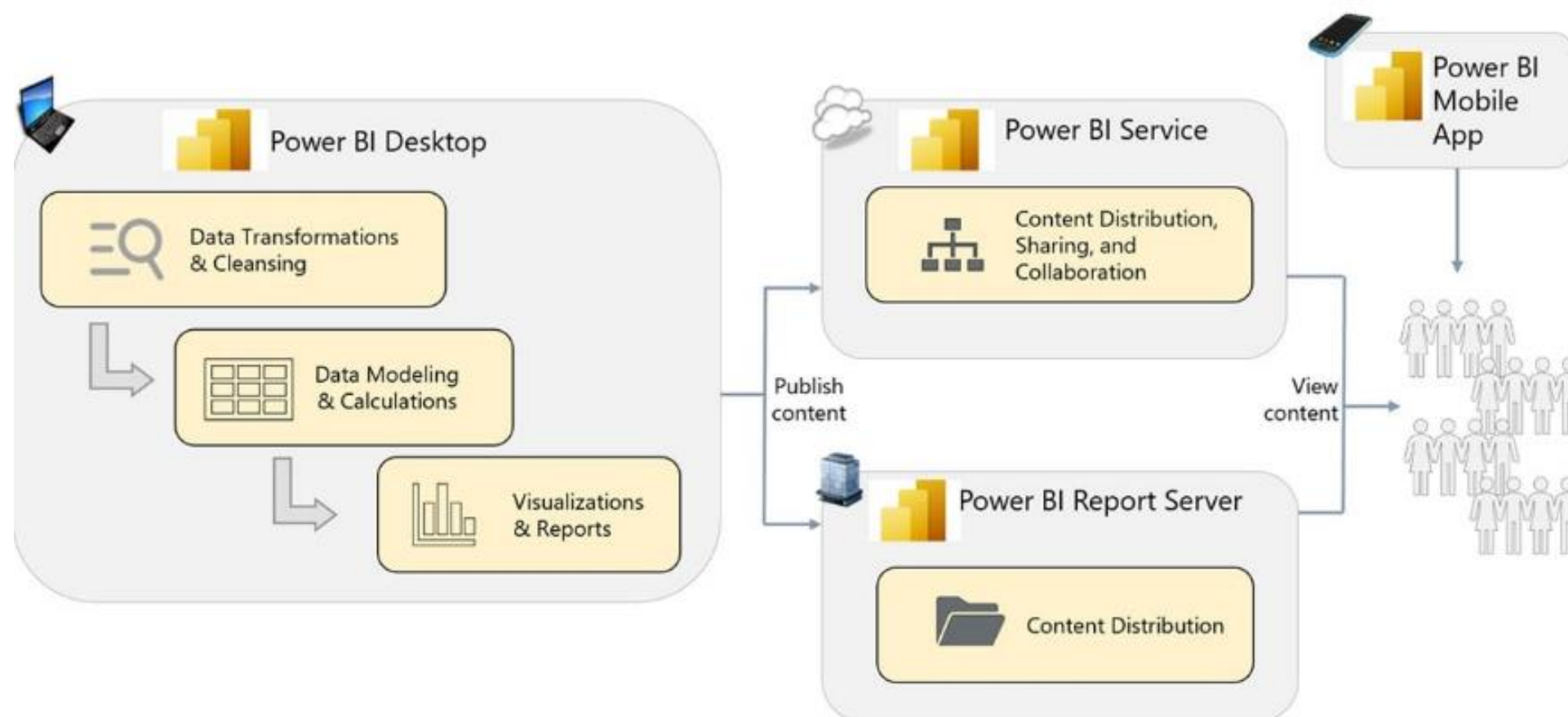
- Financial data is often siloed in the finance department, but it's a business-wide issue.
- Non-financial operators need access to the data to:
 - **Align Decisions:** Teams need shared insights to make coordinated choices.
 - **Avoid Silos:** Without access to financial data, non-financial teams make disconnected decisions, impacting the overall business.

Solution: Data Access for All Departments

Centralized Reporting Repository

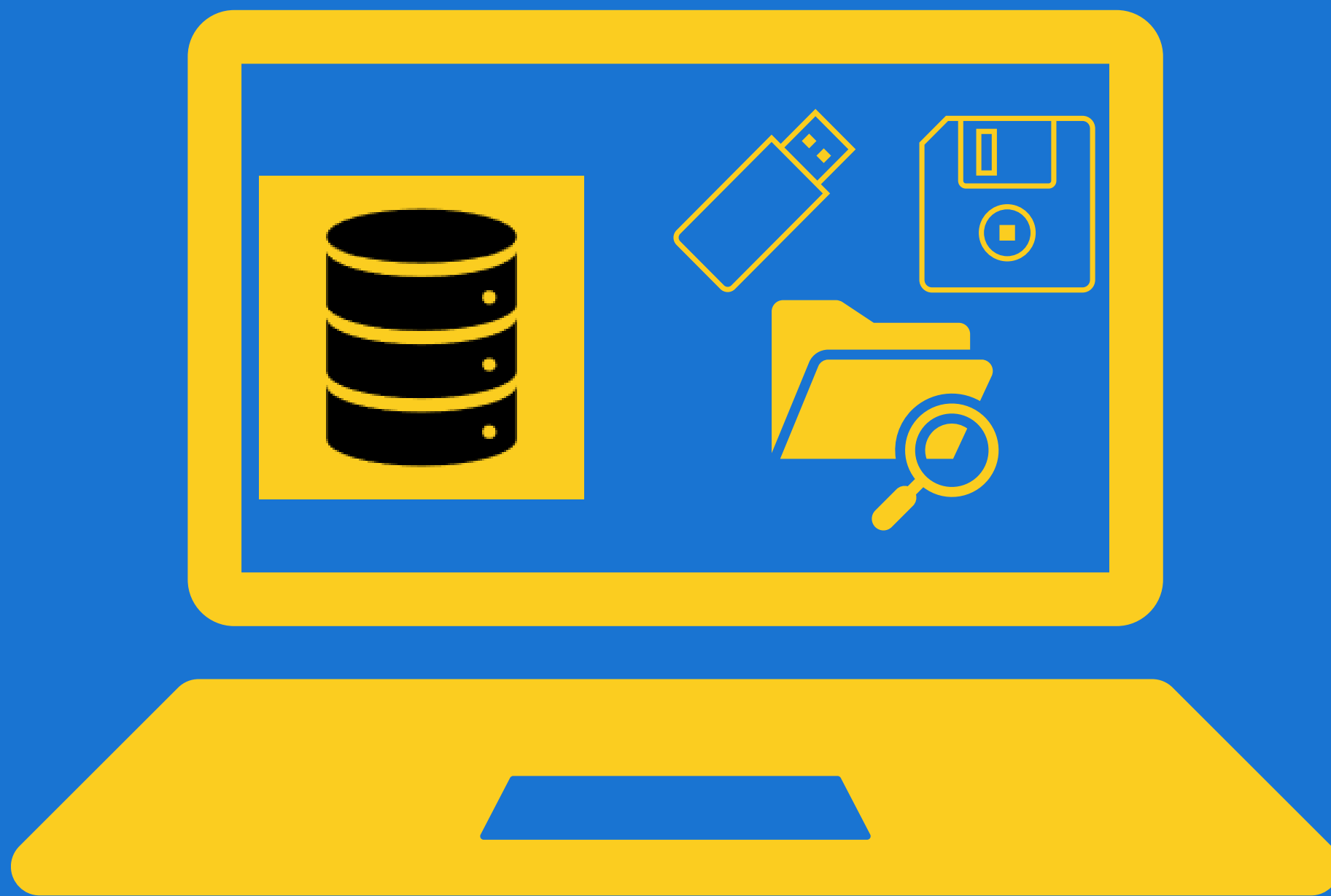
Making the People Connection

- **Single Source of Truth**
- **Row-Level Security by Role**
- **Targeted Reports, and Dashboards**
- **Content Distribution and Collaboration**



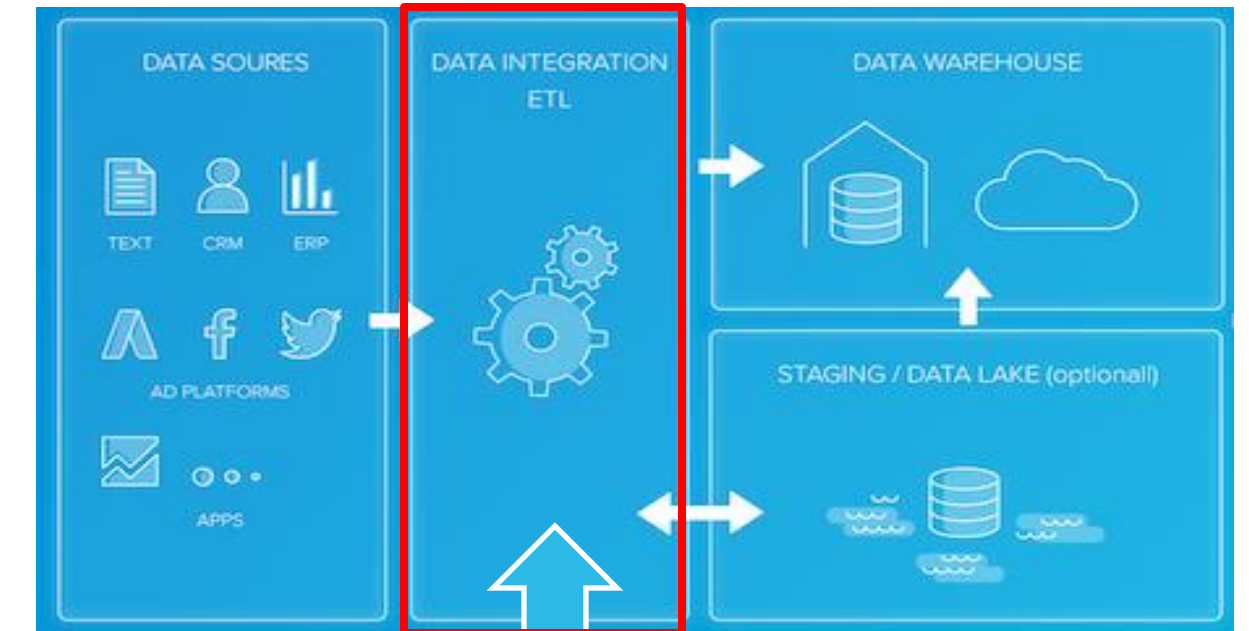
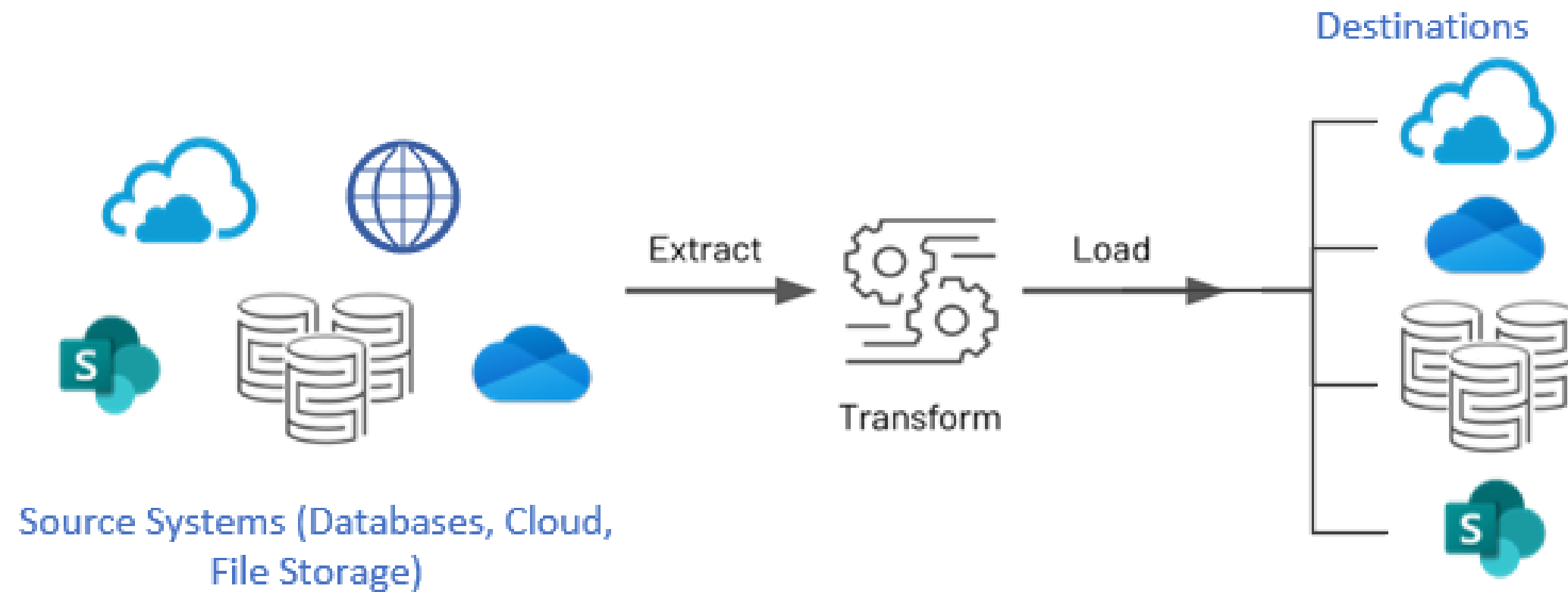
The Power BI Service allows for collaboration and sharing of data, with security measures available, giving authorized stakeholders access to *just* the information they need, when they need it.

Costly, Inefficient, and Error-Prone Data Collection Processes

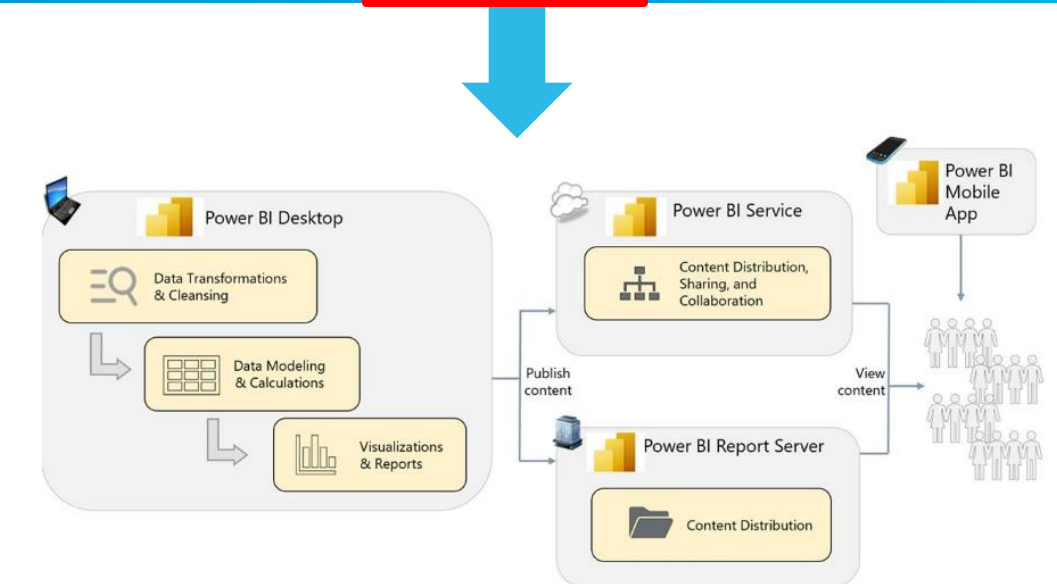


- Manual reconciliation is **costly** in time consumption, re-tasking valuable resources from other value-add work
- The availability of critical information is often **time-delayed** due to availability of data and resources to reconcile them
- The process of manually collating data introduces a **higher margin for error**, increasing the risk for gaps, mistakes, and inconsistencies
- These **inefficiencies** aggregate and compound downstream, hampering executive and management decision making

Solution: Automate Data Integration Processes



- **Integration Automation** can reduce or eliminate the labor costs associated with manual data collection and entry
- **Synchronization of Related Data** ensures accurate information with visibility both in reporting and in day-to-day task completion within disparate systems
- Eliminates messy spreadsheets and downloads, often replicated in multiple storage locations and out of date, which confuses the location of the **Source of Truth**
- This results in the overall **Business Benefit** of freeing up important human resources to focus on other value-added operations, while reducing the cost impact of rework or data loss due to error-prone manual processing.

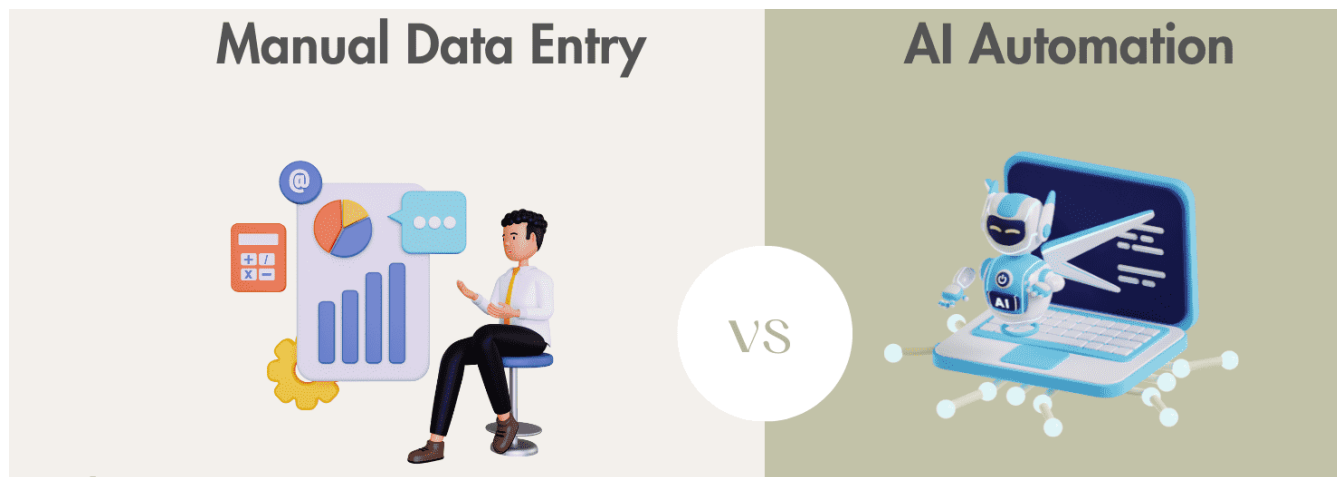


Time Cost of Repetitive Tasks



- Manual approvals, systems with disparate workflows (Timesheets & PTO)
- Alerts and manual intervention
- The need for intelligent automated decision making
- Valuable staff tied up with repetitive tasks
- Vintrace to BC, disparate ERP components (Purchasing to Accounting)

Solution: Streamline/Automate Repetitive Tasks

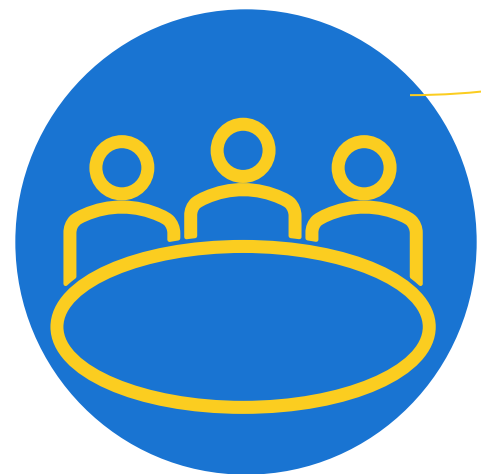


	Manual Data Entry	Automation
Labor Costs	High	Reduced or Eliminated
Error-Related Costs	High (rework, losses)	Minimal
Training and Onboarding	Significant	Limited to Moderate
Maintenance and Updates	N/A	Moderate
Scalability	Limited	High

- Automation significantly reduces the time required to complete repetitive tasks, enabling employees to focus on more strategic and value-added activities.
- It ensures high-quality and consistent outputs, which is crucial for maintaining source of truth, and customer satisfaction and trust.
- Streamlining operations and reducing the need for manual intervention can lower operational costs and allocate resources more effectively, freeing employees to engage in more creative and fulfilling work, thus boosting morale and job satisfaction.
- **Scalability:** Automated systems can easily handle increasing volumes of work without a corresponding increase in labor costs, facilitating business growth and scalability.
- **Improved Compliance:** Automated processes ensure adherence to regulatory requirements and standards, reducing the risk of non-compliance and associated penalties.

The Journey

We're here to help you start this journey. Set up a meeting with us to explore how we can help you integrate your systems and automate your data processes.



Call – High level discussion of your challenge.

- Answer "Yes," in the survey to schedule.
- Reach out to your Technical Account Manager or a member of our Sales Team.



Prioritize the key areas of focus on.

Discovery | Process Documentation
| Alignment = paid engagement
(Geography of your systems) -
Business Cartography (Current
State)



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Q&A

Are you going?

Wine Industry Financial Symposium

November 12-13

- Location: The Culinary Institute of America at Copia (Napa, CA)
- We'll be there, stop by our booth and say hi! Our booth will be near the entrance
- REGISTER BY:
 - Visiting <https://na.eventscloud.com/ereg/newreg.php?eventid=798873&>
 - Or – visit winebusinessfinancial.com and use the Registration dropdown
 - Sending an email to bgalvin@endsight.net asking to register.

It's Cybersecurity

Awareness Month!

Some additional events

Cybersecurity Fundamentals

11/5 @ 1 PM

- Monthly (usually 2nd Tuesday of each month)
- Register by: <https://bit.ly/3BnUQcs>
 - Answer “Yes,” in the form.
 - QR Code
 - Send an email to akreps@end sight.net asking to register.
 - Reply to our follow up email we will send by EOD.



Endsight Security Office Hours

11/21 @ 1 PM

- Only happens once a quarter
- Register by: <https://get.endsight.net/cybersecurity/office/hours>
 - Answer “Yes,” in the form.
 - QR Code
 - Send an email to akreps@endsight.net asking to register.
 - Reply to our follow up email we will send by EOD.



PCI Compliance for Wineries

12/12 @ 10AM

- 30-minute webinar going over PCI compliance, specific to the wine industry.
- With Michelle's BFF Stephen Hicks
 - Answer "Yes," in the form.
 - Send an email to akreps@endsight.net asking to register.
 - Reply to our follow up email we will send by EOD.

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