

## A Sales Planning Treat for Jel Sert

Jel Sert, a maker of high-quality food and beverage products, had a slow, disjointed and inefficient sales planning model that prevented them from focusing on high-level sales analytics. With Prophix, Jel Sert is able to budget and forecast detailed sales for top customers and at a summary level for other customers. This process is controlled at the by district sales manager (DSM) level using Prophix Workflow.

### Business Challenges

Jel Sert was not able to consolidate detailed budget data and issue timely and accurate financial statements with their former system. It quickly became difficult for Jel Sert to manage their data and plan and forecast at the appropriate level.

### Why Prophix?

Jel Sert chose Prophix because it enabled them to migrate their monthly financial reporting, including expense allocations, to an improved financial model. This model is used to conduct annual planning, monthly forecasting and reporting of over 500 individual SKUs in five product categories to 800+ retailers with thousands of ship-to locations.

### Results

With Prophix, Jel Sert can import the cost of goods sold from Excel by month at the category level. Manufacturing and distribution overheads are built using existing Excel templates and then seamlessly imported by account and month; these costs are then allocated to five different categories.

Jel Sert is a family-owned manufacturer and nationwide distributor of freezable novelties, powdered soft drink mixes, desserts and ready-to-drink beverages.

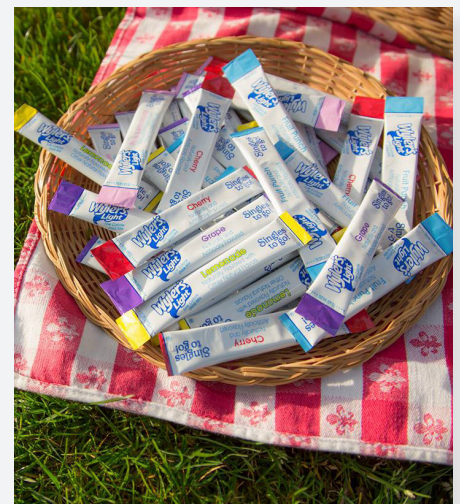
**Operating:** Since 1926

**Website:** [www.jelsert.com](http://www.jelsert.com)

**Annual Revenue:** >250 million USD

**Employees:** >1,000

**ERP:** QAD



Sales, general and administrative budgets are also completed via Excel and then imported by account and month into Jel Sert's master financial model. Jel Sert's Office of Finance can also complete sales budgeting in their Prophix sales planning model; totals by category are then pulled into their master financial model. One person is dedicated to sales forecasting and communicates directly with their DSMs monthly using Prophix dashboards.

They can also analyze unit volumes and net sales by SKU, by sales channel, by category, and by customer over time and relative to the budget for each year. Prophix also gives them the ability to analyze average net prices (ANP) on a monthly basis relative to multiple budget years because trade spending programs can vary greatly.

Plant personnel planning in support of labor standards and operations/distribution overhead is conducted by employee, by month in their personnel planning model. Summary totals by month by department/category are then imported into their master financial model. Their Office of Finance can also budget for indirect labor overtime by employee instead of job title category.



Jel Sert also calculates current and future wage increases for union personnel to analyze the financial impact on the company.

## Future Plans

Jel Sert plans to expand their operational planning capabilities using Prophix. They also plan to invest in eliminating Excel templates for overhead spending and have managers input spending projections directly into Prophix. Improved personnel planning also presents an opportunity to import actual payroll against budget for variance analysis.

## About Prophix

Prophix develops innovative software that automates critical financial processes such as budgeting, planning, consolidation and reporting – improving a company's profitability and minimizing its risks. Thousands of forward-looking organizations in more than 90 countries use software from Prophix to gain increased visibility and insight into their business performance.



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