

# EPICOR

## Success Story

### WD-40



#### Company Facts

##### Overview

- **Location**—Americas, Europe, the Middle East, Africa, India, and Asia Pacific
- **Industry**—Consumer products
- **Website**—[www.wd40.com](http://www.wd40.com)

#### Success Highlights

##### Challenges

- Lacked a combined view of the pan-European business
- Time-consuming and clunky analytics tools

##### Solution

- Epicor Kinetic (the new name for Epicor ERP) Version 10
- Epicor Data Analytics (EDA) powered by Phocas

##### Benefits

- Access to aggregated, product-centric metrics
- Provides automation and visibility into market opportunities

## WD-40 Lubricates Market Growth Using Epicor Data Analytics (EDA)

Sold and used in 176 countries to stop squeaks, lubricate, soften, and clean, WD-40™ is a household name worldwide. The WD-40 HQ team focuses on the formulation of the product, innovation, sales, marketing, and support services such as IT and finance. The “secret concentrate” for WD-40 is distributed to third-party fillers who fulfill the manufacturing, warehousing, and distribution of the product range.

Recently, WD-40’s European Division has turned their attention to their own special formula for pan-European business intelligence using Epicor Kinetic (the new name for Epicor ERP) and Epicor Data Analytics (EDA) powered by Phocas.

EDA is set to help establish and meet useful metrics to guide Europe, India, Middle East, and Africa’s (EIMEA) significant revenue growth as part of WD-40’s ambitious global targets by 2025.

### Bringing Data Together

When researching the options for an enterprise-wide data analytics solution, WD-40 wanted to use fewer products. Traditionally, they ran separate sales, financial, and forecast tools that were time-consuming and clunky to manage.

The IT team seriously considered building a bespoke solution using Microsoft® Power BI™ to create a data warehouse, but they were concerned about the high investment in time and resources.

When discussing their situation with the Epicor account manager, WD-40 leaders were brought to meet Phocas—the developers of the platform for Epicor Data Analytics—and they were impressed by the product demonstration and future product roadmap.

**“EDA is made for Epicor—it was the key for us. It’s so helpful because a lot of the development work is done for our industry...it is all built-in.”**

—Jonathan McCoy, IT Manager

“EDA is made for Epicor—it was the key for us,” said WD-40 IT manager Jonathan McCoy. “It’s so helpful because a lot of the development work is done for our industry. With Microsoft Power BI and QlikView™, there is a product, but you’ve got further work to get what you need, whereas with EDA, it is all built-in. All you need to do is ‘decorate’ the software the way you want and that is quick and easy to do.”

“The ability to immediately connect to our ERP and act accordingly—not having to develop our own database structure and views—is terrific,” McCoy continued. “If we had built our own solution from the ground up, it would always be a challenge to merge the sales and financials. In EDA, you can bring in sales and financial data and slice and dice in the Grid using measures and dimensions that suit the needs of product-centric businesses. What we liked about EDA is the long-term potential of having many different functions like sales, marketing, and finance in one data analytics solution.

## Measuring Meaningful Metrics

Part of WD-40’s challenge with setting-up their metrics was the need to work across business units and combine sales and financial data. To meet their needs, EDA’s database designer tool is used to draw data from both sets of figures. We were not interested in just recreating the reports that we got from QlikView® in the past—we want data insights to drive our growth,” said McCoy. “The outcome of internal strategy discussions was that we’re designing director-level reporting, sales manager reporting, and sales reps reporting.

“Previously, our data wasn’t consolidated. It was different tickets for different countries, so it was time-consuming. We would have to do the reporting manually and then use Excel to manipulate the data. With EDA, we will finally have a combined view of our entire business across Europe.”

## Powerful, Easy-to-Measure Metrics

Diversified WD-40 teams collaborated to determine common measures to establish and track. EDA has allowed WD-40 to easily set and measure these meaningful metrics—including being able to analyze:

- Market penetration for different and new products
- Comparisons of the penetration of new products vs. classic multipurpose products
- Product performance by place, salesperson, customer, channel, or assortment
- Total sales in a market by customer channel, and by brand all in one grid
- New business—reviewing new customers and the success of channels
- Customer profitability calculated by total sales per customer less the cost of goods—less any marketing, warehouse, and freight costs

For sales, having full visibility into a customer’s profitability measures and/or understanding the impact of discounts—for example—put them in a strong commercial position to service and negotiate using accurate data points. Previously, it was challenging to bring this to hand to enrich customer conversations.

## Reinvigorated Rebates\*

“The EDA rebate functionality is impressive. Rebates are a part of the WD-40 business that is complex and have been an area of the business that is difficult to manage,” said McCoy.

WD-40 has lots of different retailers in varied markets with many types of agreements. To capture all these rules and

\*Please note that Rebates are not a component of the standard EDA content received by Epicor Kinetic customers when they purchase EDA. In WD-40’s case, they worked with consultants to develop customized Rebates content.

calculate them accurately for financial accruals and postings is a challenging task. WD-40 had people in each country spending many days processing, and now all they have to do is put in each agreement in EDA once and the data is managed accordingly. EDA is flexible, and WD-40 has yet to find a rebates agreement that EDA can't handle.

"Rebates are a huge cost to the WD-40 business, and costs are always on the increase," said McCoy. "We have to manage every cost, so having accurate rebates fed into customer profitability reports that a sales manager can use to negotiate and work on developing the customer is very important and useful."

## More Than Just a Number

"The people and the values of the EDA team line up very well with our values and how we operate as a company," said McCoy. "Working with somebody like QlikView or Microsoft, you don't really have a deep relationship with them. With EDA, you're working directly with people."

"I like the EDA team because they are responsive," he continued. "Their support is excellent, and if there's a feature that EDA doesn't have, and the user community suggests it will be beneficial to their business, they actually move the suggestion into their development plan quickly."

"In the twelve months or so that we've been working with EDA, we've had a handful of features that we have requested that have come through. Having the flexibility on widgets has been a favorite new feature—being able to hide a set box and make better use of space is great," said McCoy.

WD-40's consulting Business Intelligence (BI) Developer, Jon Kemp, from Wisx Ltd has worked closely with Epicor and EDA to shape the dashboards and has also invested time steering many new features.

"The architectural approach to data that EDA uses is one of the best we have seen," said Kemp. "Developing a Business Intelligence framework for EDA is very easy compared to other mainstream transformation and reporting solutions from other vendors."

"The technical relationship with EDA is a close one. Having the ability to suggest new features which helps shape the future of EDA with transparent discussions between my client and Epicor has proven time and again an effective partnership. New features added based on our discussions have resulted in new data opportunities which no other vendor has come close to delivering. Overall, the time to develop, deliver, and enrich the data within EDA has been a critical success in our data projects."

## Managing Growth in the Business

WD-40 has an aggressive sales target to meet by 2025.

"We want to grow efficiently without adding too much headcount. So as a business, we need to scale-up and be more efficient and find automated ways of doing things," said McCoy.

"The sales growth will come from WD-40's current markets, and we need better data to take advantage of the opportunities and optimize around our product, customers, and channels," McCoy concluded.





## EPICOR

We're here for the hard-working businesses that keep the world turning. They're the companies who make, deliver, and sell the things we all need. They trust Epicor to help them do business better. Their industries are our industries, and we understand them better than anyone. By working hand-in-hand with our customers, we get to know their business almost as well as they do. Our innovative solution sets are carefully curated to fit their needs, and built to respond flexibly to their fast-changing reality. We accelerate every customer's ambitions, whether to grow and transform, or simply become more productive and effective. That's what makes us the essential partners for the world's most essential businesses.

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