ZenOptics

Case Study

ZenOptics Improves Brown-Forman's Analytics Usage and Business Efficiency

About Brown-Forman:

Industry: Beverage Manufacturing   **Headquarters:** United States

5,200+
Employees

170+
Countries

40+
Brands

BF-B
NYSE Ticker

At a Glance:

Challenge:

Brown-Forman had a complex reporting environment that included multiple business intelligence (BI) and analytics tools, which created dissatisfaction and uncertainty for global business end users and analysts as they tried to find, access, and work with the information they needed to do their work.

Solution:

Brown-Forman implemented ZenOptics to establish a global analytics hub as a one-stop shop to simplify the end-user experience of working with reports and organize analytics assets throughout their organization.

With ZenOptics:

✔ Business users have a single interface to **easily find and access their reports and analytics assets**

✔ Brown-Forman improved processes to curate, validate, and govern reports to create a **"single source of the truth"**

✔ Overall adoption of **analytics and business user engagement increased by 25% year over year**

✔ Individuals and teams have realized **time savings and increased productivity, efficiency, and confidence**

Background and Drivers

For more than 150 years, Brown-Forman Corporation has enriched the experience of life by responsibly building fine quality beverage alcohol brands, including Jack Daniel's and Woodford Reserve. Brown-Forman's many brands are supported by approximately 5,200 employees and sold in more than 170 countries worldwide.

Data from all Brown-Forman's brands and global operations existed in many different sources, including Tableau, SAP BusinessObjects, SAP BW, Google Drive, homegrown "portal pages" and others. This complex reporting environment created three primary challenges for Brown-Forman:

- **Frustration and inefficiencies.**
  Employees often did not know which tool held the information they needed or if it was available at all, and users were often uncertain about who to contact for help. When people couldn't easily find what they needed, they commonly requested a new report to be created – which often resulted in duplicates or slight variations of an asset that already existed.

- **Lack of consistent reporting for executives.**
  Reports for each North American region were sent to executive leadership in different formats – including Tableau, Google content, and PowerPoint. Because of this, the executives were not able to easily analyze the information to get a comprehensive, cohesive view of operations at a national level.

Brown-Forman knew they needed to improve how they facilitate and manage analytics activities, better leverage tools like Tableau to reduce expenses, and address the end user pain points.

As an initial step to understand the extent of the challenges, Brown-Forman surveyed their analytics end users and discovered:

Less than **20%** of respondents were confident in their awareness of what current reporting was available and know how to access it.

Only **30%** were satisfied when asked to rate their experience of accessing business information.

Greater than **90%** were open to changing the business information delivery mechanism.

In addition to revealing pain points regarding finding and accessing relevant business information, the survey importantly showed that users were willing to embrace change in their analytics activities. They wanted a single place to access all their analytics assets, visibility of reports they may not be aware of, deduplication and reconciliation of similar reports, collaboration, and the reduction of manual effort to discover and use information with consistency."

As Brown-Forman considered how to improve their BI strategy, they determined that a single interface for all their analytics resources would address many of these pain points for end users. The cross-platform visibility from this single interface would create the opportunity for improved curation, categorization, and search across reporting tools. The requirements for this "analytics hub" included:

- One starting place for reporting and analytics
- Easy to use and aesthetically pleasing
- Able to integrate with multiple technologies and business processes

- Searchable reports and sources
- Collaboration and feedback-enabled
- Data source/tool agnostic information in a timely and accurate manner

Brown-Forman evaluated ZenOptics and chose it to be their platform for unified analytics. ZenOptics "checked every single one" of the requirements on the list.

The Journey to Establish One-Stop-Discovery and Access of Analytics

ZenOptics implementation was driven largely by Brown-Forman's Office of the CIO, an internal "analytics partner" who interfaced between business and IT, and the ZenOptics product support team. The team was responsible not only for the software implementation but also for assessing the existing tools and the massive number of reports that were in the Brown-Forman ecosystem.

> **With the cross-platform visibility of the reporting ecosystem provided by ZenOptics, the team first undertook the cleanup and rationalization work of determining which reports were most important and relevant to end users, which may be duplicates, and which could be consolidated or retired**

This rationalization effort revealed many Tableau, Business Objects, and SAP BW reports that contained only slight variations, such as filters and prompts. With the new understanding of end-user reporting needs, many of these reports were consolidated, and the data could now be easily sorted with filters, such as by brand or region. Visibility through ZenOptics enabled Brown-Forman to optimize the use of Tableau and better leverage resources within the data and analytics team. Gina Thornton, manager of commercial reporting and BI, explains how their process improvements were directly aligned with the objectives of the analytics hub. **"The process allowed us to identify important reports and how to make them more valuable and useful for users," says Thornton.**

> **Ultimately, this rationalization clean-up effort helped Brown-Forman launch their analytics hub with curated, clean content that would yield more effective search results and could be relied upon as a single source of trusted information.**

On an ongoing basis, this drives adoption of analytics usage through consistent single-point access and sustains user engagement as people can easily find relevant information and have confidence that everyone is making decisions from the same data.

Thornton explains that with this initial and ongoing governance process, ZenOptics becomes a "single version of the truth" for end users to confidently find useful, accurate information for business decisions. "There needs to be some sort of governance around the content that is published [to realize] the benefits the ZenOptics platform is intended to deliver in the first place. Ongoing management of content is driven by ZenOptics… we use ZenOptics and the process we've built to keep everything in check."

Thornton and team continue to focus on driving value for the end users through the analytics hub. This ensures new reports are not duplicates, the reports are categorized appropriately, have clear associated business search terms, and contain additional useful metadata attributes such as "business owner" so users know who to seek out for more information.

> **The benefits of this process, says Thornton, are consistency and governance of reports, and eased discovery and access for end users."**

Outcomes

Internally branded as "Onestop," ZenOptics became a single source of trusted information from BI and analytics tools and applications across Brown-Forman.

Brown-Forman actively socializes the end-user value of using ZenOptics to continue to increase analytics adoption: "Onestop is a global analytical content consumption platform where employees access their analytics reports. It is designed to allow access to different kinds of report content, regardless of the underlying technology; users have one place to go to easily locate their reports. The platform also offers added benefits such as searching, favorites, workflows, subscriptions, etc."

Onestop provides a clean and streamlined interface so people know where and how to find trusted reports and information. Users can favorite reports for quick access, use search to discover reports across various analytics tools, and create automated workflows. The result is easier navigation and access, consistency regardless of the underlying analytics tool, increased efficiency and time savings, and an overall improved user experience due to the visibility and searchability of information.

Best Practices to Jumpstart Analytics Adoption

Brown-Forman's strategic perspective set the stage for successful results.

Understand the problem. Brown-Forman surveyed its users to understand the challenges that inhibited analytics use. The survey results were used to set clear business objectives and requirements for an analytics hub to serve as a one-stop-interface for analytics.

Business leadership commitment. Executives and business leaders support the evolution of the BI and reporting strategy to drive value from their existing analytics investments.

Partner with business and IT. The "analytics partner" role serves as a bridge between groups, translating business needs and managing expectations. This person is respected and invested in the value delivered to internal stakeholders in both business and IT – all in alignment with the stated objectives.

Focus on process. Analytics problems are not solely about the technology. Change management, process improvements, and operational efficiencies help create and sustain a solution that delivers value and meets organizational needs over time.

Measure and monitor. Tracking metrics and statistics over time shows trends in adoption and usage, ultimately providing a status check regarding the impact of the technology and the efforts involved.

"With all my favorites and dashboards in Onestop I can get to them very quickly … and bounce back and forth between them. So, it's definitely a time saver for me as I do my daily work," states Greg Wilson, a Brown-Forman retail finance manager."

Another ZenOptics feature that is widely used across Brown-Forman is workflow automations, which are grouped selections of reports and analytics assets that can all be launched with a single click. While these workflow automations are used across multiple business departments, the Finance, Sales, and Marketing functions recognize the importance of creating these workflow automations to streamline analytical business processes, drive consistency of data and definitions, facilitate sharing and collaboration, and generally ensure people have access to the appropriate data for the correct business use.

From an organizational perspective, ZenOptics delivers:

Enhanced user experience of analytics with powerful search capabilities

Curated high-quality, detailed, accurate analytics content

The ability to automate analytical business workflows

Governed, trusted reports and analytical assets for more informed and confident business decisions

Cost reduction associated with infrequently used reports, management of manual portals, tool licensing, and wasted Tableau developer resources when duplicate reports were requested

Because of the visibility and accessibility of trusted information all in a single location, users are adopting a new mindset of searching for information first, rather than just building another report. The cross-platform searchability increases self-service and reduces the burden on the data and analytics team, which can be reallocated to other pressing work. "One of the biggest time savings for us has been the ability to realize a report already exists rather than needing to develop it," says Thornton. "We reallocated resources to more value-added activities like analytics and faster, quicker decision-making."

Overall, Thornton sums up the value of ZenOptics as a single hub for reporting and analytics: "ZenOptics allows us to simplify and streamline the user experience of working with reports. Users have a single interface to find and access trusted, relevant information from which decisions can be made. Additionally, our data and analytics team established a consistent business process for reports to increase the value from Tableau and provide users with the information they needed for confident decision making."

Conclusion

Brown-Forman's commitment to analytics and improving the experience for end users has led to increased adoption of analytics within their organization. Brown-Forman executives review usage and report statistics on a quarterly basis to assess the traction and success of their BI strategy evolution. A recent executive dashboard* shows analytics growth, specifically:

Access and usage of reports increased by **27%** year over year, signifying growing demand for analytics and demonstrating increased confidence in data for decision making

The number of users increased **25%** year over year, showing expanding analytics adoption

An estimated **30%** reduction in reports from both eliminating duplicates and combining several reports into one

As more users are onboarded to ZenOptics over time, Brown-Forman is successively amplifying the power of its analytics resources and its people. In the journey to address its original challenge of improving the analytics experience, it has also established business efficiencies, time savings, improved productivity, and confident decision making based on trusted analytics.