Pendleton Leverages NetSuite Analytics Warehouse for High Impact Analytics

Established in 1863, Pendleton is a family-owned American textile manufacturing and luxury lifestyle company based in Portland, Oregon. The company has benefited from hands-on management for six generations with brick & mortar stores, ecommerce, as well as wholesale. Pendleton operates seven facilities, manages 40 Pendleton retail stores and publishes apparel and home direct mail catalogs.

THE CHALLENGE

Pendleton has two sales channels that utilize different systems: the direct-to-consumer (DTC) channel uses NetSuite for end-to-end sales and order-to-cash processing while the wholesale channel uses CGS BlueCherry ERP. To support the creation of dashboards and analytic reports for business reviews, Pendleton was performing time-consuming manual processes weekly and monthly. Pendleton needed an automated way to access metrics and analytics across these two major channels to speed creation of the dashboards, improve the ability to conduct further analysis and accelerate leadership decision-making.

"One member of my team extracted data, produced Excel reports, and sent them out to people. And of course, it was always the case of wanting to know more, understand where the data was coming from, and what was driving it," said Steve Batchelor, VP of Information Technology. "Answering these data questions meant going back and looking at the data in our core systems, source systems and providing explanations."

THE SOLUTION

By combining data from NetSuite and BlueCherry, NetSuite Analytics Warehouse provided an ideal solution to this challenge. The data warehouse layer in NetSuite Analytics Warehouse supports pulling data from any other source. Myers-Holum built a solution using NetSuite Analytics Warehouse where NetSuite ERP sales and inventory data and BlueCherry data are combined.

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Prior to selecting NetSuite Analytics Warehouse, Pendleton considered a few options including Microsoft PowerBI and concluded NetSuite Analytics Warehouse made the most sense.

"NetSuite Analytics Warehouse was the right path for Pendleton," said Steve Batchelor, VP of Information Technology at Pendleton. "In our experience with data aggregation, the more that you can do natively between two systems—and the less custom work required—result in much less time to delivery and fewer complications. That really settled it for us. NetSuite Analytics Warehouse is self-service, and we can make data-driven decisions across wholesale and DTC channels on data that's regularly updated. During peak, things can change wildly over the course of a couple days so with NetSuite Analytics Warehouse the data is always current."

Pendleton has leveraged all the out-of-the-box capabilities for their NetSuite data in NetSuite Analytics Warehouse using a pre-built data pipeline. NetSuite Analytics Warehouse also offers an ideal repository for all their BlueCherry ERP wholesale data. These combined make for comprehensive visibility across the business with powerful analytics.

During the functional requirements discovery process, the Pendleton business stakeholders wanted to include additional metrics and reporting content for inventory movement and inventory levels from the wholesale side. Myers-Holum delivered these metrics within the original timeframe leveraging Boomi as the data integration platform.

With Boomi, Myers-Holum seamlessly blended sales and inventory wholesale transactions from BlueCherry ERP with retail transactions in NetSuite and loaded them to NetSuite Analytics Warehouse.

This approach enables self-service analytics that require only a few clicks for business users with all data sources and reports automatically updated each day. Planning and budgeting can also be conducted seamlessly, accessing data across systems.

With Boomi as the data integration middleware, Myers-Holum also delivered their long-standing ETL Balance and Control Framework—all delivered on time and within budget.

This was possible due to Myers-Holum's deep Boomi expertise and large developer bench who implemented the Balance and Control Framework to provide an audit and balancing environment for Pendleton's data integration processes built in Boomi. Myers-Holum has implemented this framework for many of its large data warehousing customers over the past two decades.

THE RESULTS

Now Pendleton enjoys a complete product hierarchy, all their inventory and their product movement activity for both their wholesale and consumer channels in automated dashboards updated daily. This eliminated the need for spread-marts and associated manual processes.

Pendleton now accesses key metrics across their channels with full data lineage for drilling down to the details. As a result, Pendleton has full visibility across its channels with assured accuracy and completeness of their data in NetSuite Analytics Warehouse.

"NetSuite Analytics Warehouse provided a whole new level of data analytics and assessment," Batchelor explained. "Our team needed to fully understand how NetSuite Analytics Warehouse was aggregating the data and what it represented. Partnering with Myers-Holum was fantastic. They are data analysts and data architects at heart, with in-depth knowledge. We couldn't have asked for a better partner. No question."

Pendleton benefits from accurate, reliable and current key performance indicators (KPIs) for sales, product movement, and inventory activity. The NetSuite Analytics Warehouse dashboards unify their two major channels with daily updates of overall business activity for both wholesale and direct to consumer and drilldown capabilities to understand additional detail.

The automated executive dashboard reporting is much more robust and current than their legacy processes and system.

"For the next phase, we want to do more drill downs and pull data from another level. We also want to build out our key visualizations. Then, the visuals become the focal points, and this requires a shift in mindset because we'd been working in spreadsheets for so long," said Batchelor.

Looking to the future, Pendleton will be leveraging the machine learning capabilities that are available in NetSuite Analytics Warehouse. They are looking forward to using machine learning for inventory forecasting, sales forecasting, and demand planning. Using artificial intelligence capabilities in NetSuite Analytics Warehouse, Pendleton will work with Myers-Holum to customize planning and forecasting based on historical Pendleton data. Pendleton also plans to update their mills' ERP system. "Once we have production combined with wholesale and DTC sales in NetSuite Analytics Warehouse, we will really be visualizing everything in one place," said Batchelor. "That is going to be another huge step. We'll have complete visibility."

PENDLETON®

Company Snapshot

Company: Pendleton
Location: Portland, OR
Industry: Retail, Manufacturing

Myers-Holum

Partner: Myers-Holum, Inc.
Location: New York, NY