Malarkey Roofing Products Gains Visibility Into Key Performance Metrics via Dynamic Insights With Power BI

CASE STUDY

armanino

At a Glance

Customer Profile:
Malarkey Roofing Products is a Portland, Oregon-based roofing manufacturer providing residential, commercial and sustainable roofing solutions. Established in 1956, the privately owned company has steadily grown to three manufacturing locations and 500 employees. After replacing a legacy ERP system with Microsoft Dynamics ERP, Armanino helped Malarkey manufacture greater value from its ERP data by implementing a new business intelligence solution, Dynamic Insights.

Software & Services
- Armanino Governance, Risk and Compliance services
- Microsoft Dynamics ERP
- Dynamic Insights from Armanino
- Microsoft Power BI
- PrecisionPoint Dynamics Data Warehouse
- Microsoft Azure SQL Database
- Microsoft SQL Server (VM)
- Microsoft Azure Analysis services
- Armanino Implementation and Consulting services

Benefits
- Provides visibility into company performance data to improve decision making
- Controls access to sensitive data
- Saves finance team at least 20 hours a month that can be used for higher-value tasks

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Challenge

With manufacturing facilities in Oregon, Oklahoma and California, Malarkey Roofing Products is a premier North American manufacturer of residential, commercial and sustainable roofing solutions. The privately owned company has been manufacturing innovative, performance-driven building materials since 1956 and has grown steadily over the years.

The roofing products industry is known for its unique challenges and complexities, particularly around pricing, promotions and purchasing. Malarkey's legacy enterprise resource planning (ERP) system could no longer handle the needs and increasing complexity of the growing business. The company decided it was time to move to a modern, scalable, robust ERP system and selected Microsoft Dynamics ERP as the best solution.

The new ERP system provided the robust functionality that Malarkey's finance and accounting team required, however, the company soon wanted to extract more value from it. "Clearly Microsoft Dynamics was a big leap ahead in terms of the breadth and depth of information we could collect," says Max Schwartz, chief financial officer at Malarkey. "The next step was to find a way to provide timely and critical information from the ERP system to our stakeholders across the company."

Solution

After consulting with their Microsoft Dynamics deployment partner, Armanino LLP, and evaluating several business intelligence (BI) solutions, Malarkey chose Armanino's Dynamic Insights[SM] with Microsoft Power BI. Using data from Microsoft Dynamics, Dynamic Insights creates easy-to-use reports and dashboards that help companies quickly identify issues and gain clear visibility into profitability and day-to-day operations.

Armanino, one of the 25 largest independent accounting and consulting firms in the U.S., worked closely with Malarkey to deploy the data and analytics solution, implementing the core Microsoft SQL Server-based data warehouse that would provide the basis for company and departmental financial performance reports and dashboards. The litmus test for the new BI system would be the development of a suite of reports for the company's sales department.

"The reporting we envisioned for sales involved complexity, such as importing historical information from the previous accounting system and external information such as inventory classifications and salesperson hierarchy from separate data sources," says Schwartz.

The core data warehouse was built and delivered on time, within 30 days of the start of the project. Once that was in place, reports were developed using an iterative design process that let stakeholders review and provide input on the presentation of the data.

Once the sales reporting phase was successfully completed, Malarkey immediately began working with Armanino to develop further dashboards, analytics and reports, including margin-related reports that rely on external data for calculated rebates. "Now we can see true margin for the first time," says Schwartz.

Results

With the implementation of their new BI capabilities, Malarkey is now taking advantage of the ultimate value of their new ERP system and the data it collects. "We can finally get our hands on the critical information we need to better manage our business," says Schwartz. "Now we have scorecards that let us appropriately measure, evaluate and make adjustments within the business."

The robust Dynamic Insights reporting capability replaced manually generated reports and expanded the amount and types of reports available to company stakeholders "We have more reporting than we ever had before," says Schwartz. "Having access to performance data leads to good questions that ultimately help us improve operations."

Mobility and controlled access to data are additional benefits of Dynamic Insights that Schwartz appreciates. Utilizing Microsoft Power BI's capabilities, "I can pull up dashboards, reports and data on my mobile phone, interact with it and drill down to see where problems are," he says. Malarkey also has full control over who within the company sees what data. "Users can see their own department's information but nothing more," says Schwartz.

While it's still too early to calculate the return on investment, the new BI solution is already saving Malarkey's finance and accounting staff at least an hour each day. That's time that they can now spend on analysis and other high-value tasks.

Next Steps

Next up for Malarkey and Armanino is to put even more financial information into the hands of department heads, so they can monitor and track performance in near real-time.

"We're working on delivering a common scorecard that will help our departments be more efficient with inventory, procurement and production processes," says Steve Hanks, IT manager at Malarkey. "Armanino is extremely responsive in its advisory role to help us structurally enhance the data warehouse to support our current and future reporting needs."

About Armanino^{LLP}

Armanino provides an integrated set of accounting services—audit, tax, consulting and technology solutions—to a wide range of organizations operating both in the U.S. and globally. You can count on Armanino to think strategically, to provide the sound insights that lead to positive action. We address not just your compliance issues but also your underlying business challenges, by assessing opportunities, weighing risks and exploring the practical implications of both your short- and long-term decisions.

When you work with us, we give you options that are fully aligned with your business strategy. If you need to do more with less, we will implement the technology to automate your business processes. If the issue is financial, we can show you proven benchmarks and best practices that can add value company-wide. If it's operational, we'll consult with your people about workflow efficiencies. If the challenge is compliance, we'll ensure you meet the requirements and proactively plan to take full advantage of the changes at hand. At every stage in your company's lifecycle, we'll help you find the right balance of people, processes, and technology.