7 Ways to Supercharge Your Supply Chain Team

QUICK BASE

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Introduction

Supply chain is one of the most interconnected and impactful functions in a company. As a supply chain professional, you are responsible for the most critical function in the business – delivering your product or service to the customer.

If you're using an ERP, that can go a long way in terms of giving you control over your supply chain. However, there are probably still challenges that prevent your team from operating at its best. You might have trouble spots in your supply chain where the visibility just isn't there, or be wasting time and increasing risk by running manual "extra" processes on the side for things an ERP isn't designed to cover.

These challenges often revolve around a few key issues:

- **Coordinating effectively with other functions:** Cross-functional coordination is essential for supply chain management—you and your business partners need to be able to collaborate effectively to do your jobs well and be accountable to each other. Yet this can be a sticking point. You may lack visibility into what they are planning, or spend hours chasing each other for updates. When projects need input from multiple parties, there's often no streamlined way of collecting and tracking their contributions and ensuring that all work is completed on time.

- **Getting the visibility needed to meet customer SLAs:** Meeting customer expectations consistently is a requirement if you want to remain competitive and retain your customers. When data is hard to access and is not in a readily actionable format, it can be hard to spot problems before they happen and harder to resolve them. Too often, businesses can miss customer deadlines and have to diagnose "What happened?" after the fact.

- **Spending time on "busywork," not strategic thinking:** Manual processes can be a distraction for the team and keep you stuck in reactive mode. Whether it's arduous manual reporting or spending a lot of time adjusting orders, these tasks can quickly absorb the majority of the team's time. This prevents you and the team from getting "ahead of the game" to do the work needed to improve future business and operational performance.

The good news is that it's absolutely possible to break free from these vicious cycles and get your team functioning at a higher level.

Much of your supply chain may already be automated, but further automating where there are gaps in planning, order management, inventory, or procurement processes can help streamline these tasks so that you can focus on strategies to drive the business forward. It can also improve accuracy and help you deliver real-time insights when and where they are needed most. Ultimately, automating these processes will help you better meet customer needs, increase productivity, and drive long-term growth in the business.

Solving these supply chain challenges is now easier than ever, thanks to a new breed of no-code platforms that enable business problem solvers to build apps to automate their processes and create better ways to work, regardless of technical background. The seven Quick Wins featured in this eBook were created quickly and most did not require significant technical expertise. By automating critical processes with Quick Base, these businesses were on their way to saving time and money while improving their performance.

Ready to find out how they did it, how long it took, the kind of impact it made and what they advise? Read on!

Planning

Quick Win #1:
Improving Visibility Across Functions

Kevin O'Boyle

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Director of Marketing and Demand Planning, Metro Industries

Over 10 years in strategic planning, marketing and engineering

Pipeline Forecasting

"As a manufacturer of transport and storage equipment for the healthcare and foodservice industries, Metro has a lot of large, custom orders. When I started, the commercial team had a pipeline management tool to manage performance and corporate financial commitments, but supply chain didn't know it existed. This made it hard to plan for future orders because we lacked the visibility to order the right mix of components, many of which had long lead times.

In supply chain, information has to flow, so we added requirements into the pipeline tool with Quick Base to provide the visibility needed into future demand. Commercial teams input upcoming orders, confidence level on how likely the sale is to close, and information pertaining to key supply chain pain points. When the confidence level exceeds a threshold, the pipeline project is routed through a workflow for validation. Automated notifications alert teams about projects that need to be reviewed immediately. Supply chain can always see what's coming down the pipeline, and because we can start planning for more complex orders earlier, we can offer customers shorter delivery times, which makes it more likely that we'll win the project."

Time Investment: : 1 week to define the supply chain requirements and workflow needs; and 1 week of Quick Base application building

Business Impact: Reduced lead time from 30 to 10 days on one product line; improved on-time fulfillment; increased revenue by being able to offer customers shorter delivery times (e.g., 2 weeks vs 6 weeks)

Kevin's Tip: "Building an automated tool is a great way to translate your pipeline into gross requirements and a detailed materials plan. It's faster and more accurate than using models based off historical data or excel-based forecasting models."

Order Management

Quick Win #2:
Spotting and Resolving Issues Quickly

Rich Buckley

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VP Global Operations, Metso

Over 20 years in operations and product management

Order Management

"At Metso—an industrial machinery company in the oil and gas, mining and aggregates industries—our orders are very complex and several time-critical steps have to happen in quick succession. In the past, our order management processes weren't integrated and there wasn't an easy way to see whether a given order was on track to meet its delivery date. We spent a lot of time chasing down different teams across the business.

To address this, we built a suite of apps called the Global Operations Data Center to manage orders, engineering, and inventory. We are able to tie multiple data streams together from our ERP, inventory, and data warehouses, ensuring real-time data visibility throughout the order management process. We can easily see the status of an order and assign action items to teams, or flag issues and escalate if necessary. It has made our operations far more efficient and transparent. Now it's clear who is doing what, how much work is being done, and when it will be completed."

Time Investment: Initial apps went live within 2 months. Apps have continued to evolve and develop as an evergreen process to meet changing business needs.

Business Impact: Significant cost savings, more efficient and transparent work process, and a more open and collaborative work environment for employees.

Rich's Tip: "Build tools that get everything out into the open. Everyone should be able to look at the same view and see the latest status updates and who needs to take action next."

Quick Win #3:
Getting it Right the First Time with Standardization

Erich Wehrmann

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Solutions Architect,
Harder Mechanical Contractors

12 years in IT and
Business Intelligence

Fabrication Orders

"As a mechanical contractor company, Harder often performs the design, fabrication and installation of process piping and other specialty parts. Each item is unique with different sizing, material, and quality specifications and if an error is made, the rework is costly. We used to get this information to our shops with a combination of emails and phone calls, but this was inefficient because we'd rarely get all the necessary order details the first time around and there was no way to track an order.

We now use Quick Base apps to streamline this process. When Site Managers enter order requests in their Project Management app, the fabrication shop is notified automatically. The shop then reviews the order to confirm specifications, material and schedule needs. There's even a workflow built for when the requested date isn't feasible. Next, the app tracks the request through production and shipping and sends automated updates to the job site. This has saved us a lot of back and forth and the sites always know the status of their order, and we've seen a significant reduction in our rework."

Time Investment: 4-6 weeks

Business Impact: 60% reduction in rework items; 100% reduction in lost items

Erich's Tip: "Once you start automating, you'll see opportunities everywhere. Harder now has a philosophy of 'if it's in a spreadsheet, it would be better in an app.'"

Inventory Management

Quick Win #4:
Taking Control Through Better Tracking

Kent Hultstrand

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Director Of Business Operations,
Packerland Broadband

8 years in operations

Inventory Tracking

"As a telecommunications company that provides internet, cable and phone service, we have a lot of technicians in the field who need to have the right equipment with them at all times. We tried to track the inventory technicians needed or had on hand through spreadsheets and emails, but it was inefficient and not very accurate. It didn't give us enough visibility to make informed decisions about our purchasing patterns or inventory levels.

About a year and a half ago, we built an app that automates tracking, reporting and trend analysis for all our parts and equipment, from our warehouses to the trucks. Technicians do a monthly inventory check on their trucks and enter their needs through the app on their tablet, phone or laptop. This ensures technicians have the parts they need to serve customers and it has made the ordering process much easier for them. We also have better visibility into parts usage and can recognize expenses when parts are used versus when they leave the warehouse. We've continued to iterate on the app, adding new functionality as we go, and now we're looking to shorten the intervals on which we're using it."

Time Investment: 1 month

Business Impact: Reduced time on monthly inventory reporting from 4-5 hours to 30 minutes; 10-15% improvement in time from order request to fulfillment; improved inventory turns; reduction in customer churn rate

Kent's Tip: "Be open minded when you're building an app. You might think you're solving one specific problem in a specific way, but you'll find that an app can have more functionality and touchpoints than you ever envisioned."

Quick Win #5:
Turning Data Into Actions

Inventory Health Management

"For many years, we've used an off-the-shelf planning tool to manage our inventory. It's good for some things, but to manage inventory levels, you needed to click in SKU by SKU. This takes a long time and even when you've seen the inventory plan for a given SKU, there's nothing automatically telling you 'what is the current risk level?' The team was always firefighting, and we lacked a risk-based approach to inventory planning.

We needed this process to be a lot faster, simpler and to be able to spot at-risk SKUs before a stock-out. Now, we use a custom app that is fed with a daily data extract from the off-the-shelf system. The app automatically categorizes the SKUs as green, yellow or red and tells you the actions that need to be taken, by when, and in order of priority. It has a dashboard that shows us how healthy our inventory levels have been over time. It has eliminated a lot of manual labor and guess work and helps ensure we always have the stock we need so we can meet the needs of our customers."

Time Investment: 4 hours of application scoping; 3 days of application development

Business Impact: Approximately 10% reduction in stock-outs and expedited freight spend

Kevin's Tip: "When you're building your first app, I wouldn't choose something where there are a lot of process unknowns. If you pick something you know well, you'll be able to build your Quick Base skills so that you can take on more complex projects."

Kevin O'Boyle

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Director of Marketing and Demand Planning, Metro Industries

Over 10 years in strategic planning, marketing and engineering

Fulfillment

Quick Win #6:
Identifying Root Causes to Avoid Future Issues

Aditya Ramani

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Sr. Supply Chain Business Process Analyst, Illumina

7 years in supply chain analytics

Order Fulfilment

"As our business grew, our customer base expanded – from genetics researchers to organizations conducting clinical trials – and so did the complexity of our orders. After implementing our ERP in late 2015, we found that our on-time shipping rates were lower than they should have been, but we didn't have much visibility into why. We had shipping data in our ERP, but it wasn't readily usable by the team.

We built an app that takes a daily extract of delayed shipments and assigns them out to members of the team to add comments. It's easy to get input from a number of people on one platform. This has allowed us to identify and quantify the root causes of our delays. We run a weekly meeting where we review the outputs from the app and determine the actions needed to address any issues. We have solved the biggest drivers of delays and many of the smaller ones as well."

Time Investment: 3 days

Business Impact: Significant improvement in on-time shipping rates

Aditya's Tip: "Once you've quantified your root causes, you can address the biggest ones first, but there's also a lot of value in addressing the long tail."

Procurement

Quick Win #7:
Eliminating Unnecessary Spend

Connor McGauley

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Operations Executive Associate,
Welsh, Carson, Anderson, & Stowe

6 years in operations
management

Vendor Spend Analysis

"Spreadsheets in procurement are quickly becoming a thing of the past. When our private equity firm invests in a portfolio company – whether in healthcare or tech – we often see procurement using numerous spreadsheets to track vendor spending while relying on IT to provide the correct data.

Using a self-service application platform, I built a vendor spend tracking solution. Now, the companies load all their data into the spend app in just a few minutes each quarter, and receive categorized information that flows into a dozen reports. These reports are automatically updated and distributed to their leadership teams. We can easily identify categories to target for savings and monitor areas of rogue spend. It has been an effective tool for eliminating unnecessary spend while providing a platform to create and manage our annual savings plan."

Time Investment: 2 weeks

Business Impact: Enabled $3 million in savings by managing annual savings plan; delivered business insights 10x faster

Connor's Tip: "The quicker and easier it is to assess the data, the more rocks you can turn over to find value. Simple to navigate visualizations that can be easily shared across the organization empower our procurement directors to do more than just source contracts."

Your Quick Win

These six supply chain professionals have each exemplified how they took the lead and delivered real business impact. Rather than live with time-consuming or suboptimal processes, they developed custom applications with Quick Base that streamlined their internal operations and improved customer satisfaction.

By leveraging this new business-accessible way to create apps for process automation, you too have the means to empower your team and your company. Get a head start with this summary of their advice:

1. **Prioritize processes for automation:** you may want to start with the most troublesome process or you could also choose a simpler one to automate first in order to find your feet.
2. **Choose the right technology:** decide what the best technology is to solve your particular problem. Is it a change in your ERP, an off-the-shelf product, or a more flexible application building platform that you can use, regardless of technical background?
3. **Plan your solution:** map out your solution first, including the data flows, process steps, and stakeholders, and then build it in your technology of choice.
4. **Implement and measure:** a well-designed solution can be quite straightforward to implement, but be thoughtful about who needs what info in the rollout process. Remember to measure the "before" and "after" of your process so you can celebrate success!
5. **Iterate and improve:** many apps will evolve over time, especially as you start to see what you can do. Whether it's refining a process or adding new functionality, you're sure to have new ideas on how to keep getting better.

As is the case with our featured supply chain professionals, the quick wins you achieve today become the springboards for opening unlimited possibilities to drive greater productivity, agility, revenue, and business growth tomorrow.

About
Quick Base

Quick Base provides a cloud-based platform that empowers problem solvers to quickly turn ideas for better ways to work into apps that make their organizations more efficient. For nearly 20 years, people of all technical backgrounds have been using the Quick Base platform to create solutions that streamline processes, capture real-time data, and improve company operations, all while working in concert with existing IT systems. Based in Cambridge, MA and a former division of Intuit, Quick Base has a 6,000+ customer universe of app-enabled businesses that spans all industries and company sizes, and includes half of the Fortune 100.

» Are you ready to supercharge your supply chain team and overcome your time-consuming and suboptimal processes?

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