

QlikView is the key to flexible and efficient credit control for WR Refrigeration

“ The flexible approach and immediate time and cost savings have transformed our credit control team’s daily routine. QlikView is now embedded in our working lives, and has paid for itself with more accurate information and a clearer focus on cash generation and debt management. ”

Paul Brown, Finance Director, WR Refrigeration

A BIAS customer since May 2008 after the successful implementation of a QlikView suite of operational reports, WR Refrigeration’s head office is in Thurmaston, Leicester, and has 16 branches nationwide, specialising in refrigeration, air conditioning, servicing and maintenance.

WR Refrigeration employ around 600 staff nationwide. Its client base is primarily from sectors of



the food industry, retailers and wholesalers, and fruit and vegetable growers.

No Time For Credit Control

Soon after starting in her new role as the company’s credit manager, Hannah Hamson found herself with precious little time to do the job she had been employed to do.

Instead of focusing on the vital job of coordinating her team of staff to manage the overdue debtors and keep the company’s cashflow healthy, Hannah was spending as much as 10 days a month grappling with data from the company’s finance system in order to produce a large number of reports.

The process meant that Hannah had no choice but to go about the long-winded, time-consuming task of exporting different information in the debtors ledger to Excel, and then merging it with the previous month’s spreadsheets to compare data. Hannah knew there had to be a better way to view essential data and allow her to concentrate on her most crucial role – debt recovery.

She explains: “I was spending all my time creating the reports rather than getting the money in. My previous role provided me with a much more efficient system. I explained the problem to our Finance Director Paul Brown, who immediately recommended BIAS who had helped install the company’s operational reporting system.”

Solution Overview

WR Refrigeration Limited

Refrigeration and air conditioning specialist for the food retail and production sectors

Function

Finance, credit control

Geography

United Kingdom

Challenges

- To free up vital working hours for the credit manager
- Data exported and manipulated in Excel

Solution

WR Refrigeration introduced QlikView to their credit control team, with the initial prototype available within hours.

Data can now be analysed daily, without resorting to exports and lengthy data manipulation

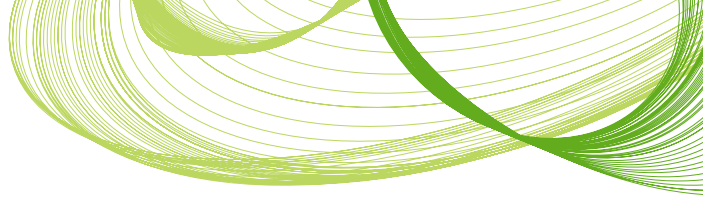
Benefits

- Easy to install with minimal interruption to existing systems
- Little initial training required
- Suitable for non-technical users
- Flexible and intuitive data capture
- Rapid and visible return on investment

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Flexible, Time-Saving Analysis

Installing an entirely new system was understandably out of the question, but there was no doubt that an application which made data more flexible and adaptable was vital for the company's financial progression.

With its simple interface and clarity of information, QlikView was the natural choice.

BIAS prototyped a solution based on Hannah's existing data, and in under an hour, easy-to-install QlikView had become an integral part of the credit control team's analytical toolkit. With a further half an hour's initial user training

. "It's taken a lot of pressure off me and I can now get what I need at the touch of a button."

As well as the time-saving benefits, and enabling Hannah to carry out her main role more efficiently, QlikView has increased the general accuracy of the reports and has enabled her to focus on improving credit control processes, including:

- separate analysis of open query or retention accounts which have different terms and requirements
- providing daily, weekly and monthly cashflow forecasts for the financial controller based on targets set for the credit control team

this made BIAS's unflagging support so valuable to her.

She says: "BIAS have been fantastic, particularly with helping me to get the new solution up and running. The training was also very useful. I didn't even have to leave the office as they visited me on site.

"I just told them what I wanted. They went away and came up with exactly what I had asked for.



“ QlikView has saved me 8 days a month... I can now get what I need at the touch of a button. ”

Hannah Hamson, Credit Manager, WR Refrigeration

for Hannah, the time savings were quickly achieved.

"QlikView's not complicated at all," says Hannah. "With the training and phone support, I only needed about half an hour of training in its use, then a little phone support afterwards.

Hannah and her team are now able to instantly access and analyse any relevant debtor information.

A Rapid Return On Investment

"The new solution has saved me eight days a month," says Hannah.

- integrated profiling and risk analysis of the customer base

"It's enabled me to chase customers' unpaid invoices and to manage my team. The stress relief is wonderful – it's made my job a lot more enjoyable and manageable. I have been able to target specific improvements in the reduction of debtor days and then measure the progress against these in QlikView."

Exactly What Was Asked For

Hannah freely admits to being "a bit of a technophobe", and says

I was also given support when it all went live.

"BIAS are always very quick to respond when I need help."