DataSelf
BI for mid-sized companies

ColemanOil

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Coleman Oil Moves Forward with DataSelf BI Software

Having fast access to data has translated into a 7-figure revenue gain over the last two years.

Coleman Oil is a last-mile distributor for a wide range of petroleum products and serves Washington, Oregon, and Idaho in the Pacific Northwest. While its primary clients are farming operations, construction, forestry, and mills, the company also operates some retail gas stations.

Like many growing organizations, the executive management team realized they were not getting the reporting needed in time to make informed business decisions. Coleman Oil has been using Sage ERP system, which wasn't meeting its reporting needs because of the company's large volume of data and complex reporting needs. "It was extremely time consuming and difficult to get the information we needed," says Ian Coleman, Executive Vice President at Coleman Oil. "We were largely blind to what was happening on a day-to-day basis." The company decided to invest in DataSelf, and this is when Coleman Oil's reporting started changing dramatically for the better.

Broader Reporting Capabilities Creates Comprehensive View of Company Trends

DataSelf lets Coleman Oil combine its financial and non-financial data to get a true end-to-end picture of its business. Ian says that he can now compare things like payroll and sales data and create efficiency metrics on the fly. "I'm a big data nerd, so I love DataSelf," says Ian. "We can quickly and easily perform trend analysis on pull points and allocations and get a broader understanding of what's going on in the marketplace."

Ian adds that with DataSelf, "I've been extremely impressed by their support and response times. Most software companies take days to get back to you if you have questions or an issue. At DataSelf, they respond in 24 hours, consistently. It's unusual to get that level of service."

Bob Coleman, CEO and President at Coleman states, "DataSelf gives our front-line managers faster access to customer margins and volumes. When we run reports, it shows everyone what happened yesterday and we no longer have to wait for the monthly financials to come out. By being able to analyze our numbers mid-month, we can be so much more proactive and continue to grow our business."

Major Benefits Include Customer Retention and Revenue Gains

"One of the biggest benefits to having accurate, timely reporting is being able to improve our delivery revenue per hour by 7% over the last year," says Ian. "A 7% increase in delivery revenue per hour is an efficiency that translates directly to our bottom line." In fact, this 7% improvement contributed to a 7-figure gain to Coleman Oil's bottom line over the past two years!

The reporting from DataSelf has also helped Coleman Oil improve its customer retention levels. "Before, when we had to wait so long for information, we didn't realize when a client was gone—or was on the verge of leaving—

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until sometimes it was months too late," says Ian. "Now, with information right away, we can tell exactly when a customer's usage started declining and proactively contact them before they move to a competitor. Being able to extract data quickly and follow our customers' purchasing patterns has helped us identify issues and retain more business."

Endless Reporting Options Empower Coleman Oil

Coleman also uses DataSelf to monitor their truck fleet trends and reporting. KeepTruckin reporting shows which drivers are using which vehicles, where they are being driven, and how long of trips. With the data from Sage, DataSelf also simplifies IFTA reporting. The ongoing Fleetio integration will show maintenance requirements by make, model, and year of the vehicles, so they can start to see which vehicles are most cost effective, which hold up long-term, which should be replaced. As Sage, Truckin and Fleetio data come together, Coleman will also report which routes and/or drivers cause more wear and tear per mile and investigate ways to minimize that.

To sum up Coleman Oil's experience with DataSelf, Ian adds that, "If you're not using a strong BI tool in your business, you're really missing the boat. DataSelf makes BI super approachable because of its leading combination of a strong BI tool and outstanding level of service."