

Phocas Gives Obex Protection the ultimate data solution



The Obex Protection team uses Phocas data analytics to quickly understand how the business is tracking across its three international divisions.

In 2008, the founders of **Obex Protection** in Crown East, Worcester saw potential for better glazing and façade sealing technology for the construction market in the United Kingdom. The company recognized that while there was a base range of products for the market, it was primed for innovation with customers needing better, more tailored offerings.

Today, the company has 28 people in the UK, a remote facility in Australia and a salesperson covering France. Obex manufactures, converts and distributes two main product lines, including weather sealing products for the commercial glazing industry, and temporary protection solutions such as films applied to windows and façade to shield them during transport and installation.

Evolution of BI solutions

When the company first started, it was using Sage and Act to manage its data analytics, combining the two to help the sales team review the history of customers' purchases. The integrated system was limited, not allowing users to drill into the data to find out margins or buying patterns. It was a simple solution that identified the sales value of each customer, but not much more. The company then brought in Sales-i, which bolted onto Sage.

“Sales-i was the next step in our BI evolution, but we quickly learned that it was not going to give us what we needed,” said Tom Francis, Managing Director of Obex.

Client [Obex Protection](#)

Industry Manufacturing

Sector Building and Industrial

HQ Location Worcester, UK

ERP Sage 50

“With a mobile sales team and international offices in Australia and France, we needed something more flexible. While Sales-i is cloud-based and they offer a dedicated app, it is not very intuitive and provides an entirely different experience than the desktop version.”

The international workforce was a key driver in looking for a new BI system, and Tom found Phocas through UBT.

“We selected Phocas because of its flexibility and the ability we have to customize the software to fit the various needs of our departments,” added Tom. “**The Phocas team worked carefully with teams across Obex to give them the ultimate data solution.**”

Integrating Phocas throughout the company

Currently, six people on the Obex team use Phocas on a daily basis, including sales and purchasing. The company is in the process of also rolling out Phocas to the production team, which will add another 2-4 users.

In addition to monitor future sales orders, future purchase orders going in and out, Obex users lean on Phocas' favorites and alerts functionality and make frequent use of Phocas Dashboards. Among the key uses of the Phocas system include:

- Sales Invoices
- Sales Orders
- Stock
- Purchase Invoices
- Purchase Orders
- Demand Quantity of their bill of materials.
- General Ledger

Every morning, individual sales results from the previous day are automatically sent to each rep which removes the need to manually add up the totals. This report is the first thing the sales team reviews in its morning stand-up meeting. They also use Phocas to monitor declining customers and track customer buying patterns, as well as for margin analysis. Obex calls it ‘saving customers’ as Phocas allows the sales team to see who has and hasn’t ordered each month.

Tom added, “With Phocas, you can quickly spot customers who haven’t ordered for a few months, which gives us a chance to phone them about the decrease in orders. In some instances, this will reveal that they may have received cheaper pricing from a competitor, allowing us to revisit pricing.”

The purchasing team uses Phocas for a consolidated stock report that includes stock forecasting, stock usage and demand planning.

“We’ve had issues with non-stock items and consumer products not always pulling through on the Sage report,” said Tom. “Phocas is helpful because with a single-click we can pull everything we need on a single dashboard or report.”

Making more informed business decisions

Among the other features that Tom finds useful is the map view of customers, adding “If we are in a specific geographic area, we can book other appointments based on our vicinity to other customers. This saves a lot of time from searching on databases.”

A custom end of the month report also helps to break down sales by product silos, allowing the company to see how it is tracking actual revenue vs budgeted for each product group. Tom is also using Phocas to monitor individual targets for each sales rep so the company can track how they are doing against their bonus structure targets. In addition, Phocas flexibility allows the Aussie business to run a separate Sage system using the same log-in access to the shared databases so everyone is accessing and analyzing the same data.

“For me and many of our users, the key benefit of Phocas is it's so simple to use,” said Tom. “We can go into Phocas and get to where we need to go quickly. We can drill down in two or three clicks to get into granular level of detail, which is more user friendly than our previous system. **We have increased intelligence about our customers, and we can find details about everything from individual product sales to gross profit percentage,** allowing us to quickly adjust our strategy and make more informed business decisions about customers.”

In the future, Obex plans to use Phocas for new and different reports, including top customer analysis.

Tom concluded, “Phocas is powerful, and its impacts are particularly evident on bigger accounts where a few small changes can make a big difference.”

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