Give Them What They Want

Hardee's franchiser improves data usability to help with insights, marketing plans and more

by **CRAIG GUILLOT**

As retailers continue to generate increasingly vast amounts of data through new point-of-sale systems, many are upgrading infrastructure to process it all. For a quick-serve restaurant franchiser with several hundred locations, the ability to capture, manage and use data across the organization can ultimately lead to big improvements in the bottom line.

Boddie-Noell Enterprises is the largest Hardee's franchise operator in the country, with more than 340 stores in four states. Founded as a family-owned company in 1962, three years ago the

company started to reconsider the way it processed data, says Boddie-Noell Senior Software Developer Will Haley. With a growing number of stores and an expanding menu, BNE needed a more comprehensive, efficient and easy-to-use enterprise system to process and analyze the information it had.

The biggest shortcoming with the system at the time was that it required a technical developer to generate and make reports. The marketing department had to solicit the help of an internal technical developer every time it wanted to make

changes to a report or drill down further to look for trends.

"Our IT staff was becoming a bottleneck for the process, and for our marketing team, they were using an Excel spreadsheet to do these incredible analytics works," Haley says. "It was taking them too long and was inefficient."

BNE often works closely with Hardee's parent company CKE Restaurant Holdings Inc., but while BNE owns and manages its stores, it doesn't set pricing or menus and has limited control of how it can promote and market items. Like

many franchisees, it must leverage data and insight to optimize the marketing guidance at its own stores. In trying to find a new way for the marketing team to have better digital tools to adapt and become more agile, BNE needed a highly customizable system that could fit the needs of its operations.

POWERFUL ANALYTICS ENGINE

BNE ultimately selected SAS Viya, a cloud-enabled, in-memory analytics engine that offers scalable processing to address the analytical challenges of today's growing organizations. Viya helps organizations better process data and gather insight across all departments with an intuitive analytics system that does it all under one platform.

"It enables companies to pull all the data together that they have around the customer, around sales, around product," says Dan Mitchell, global retail practice director at SAS Institute. "We provide one environment where they can get access to it, do business intelligence and visualization."

Viya can reduce the cost of maintaining and managing multiple code bases, help organizations more easily govern and maintain their data, and scale up and out as needed. Through an internally hosted virtualized server, Boddie-Noell was able to deploy the latest capabilities of Viya within a week. The marketing team instantly attained a new level of flexibility and agility that enabled them to access data in a timelier manner and better monitor promotions, says Boddie-Noell Director of Marketing Pam Spivey.

The simplicity and ease of use created a self-service environment for end users. Employees can now access transactional data from all stores, including every aspect of the order from the time it was placed to the itemized breakdown of what was ordered to the employee who rung it up and the payment method. And they can do it all instantly without calling IT.

The new level of operability has opened a new world of customer insights, enabling the marketing department to access detailed data to

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refine and optimize marketing strategies. Being able to take that data down to a more granular level helps them identify more trends, Haley says. "The hours and transactional data are at our fingertips, allowing us to fully understand how a promotion is impacting our business," Spivey says.

For example, BNE has a weekly product mix report that it uses to track certain key products that can change periodically. Before the SAS system, the marketing team had to submit a change ticket and go through IT to change reports. The team can now do the analysis entirely on its own and drill down through the data to identify more trends. Having access to the lowest grains of data has made a tremendous difference, Haley says.

"It takes a long time to find a lot of high-value opportunity in aggregate decision-making," Mitchell says. "Looking at that low-level data, finding each and every opportunity, and then acting on it, is the key to success."

LOSS PREVENTION AND OTHER APPLICATIONS

Despite the advancements in cloud-based tools and data analytics, Excel remains the default tool for many businesses, Mitchell says. The biggest downside is that it lacks visualization, a critical element for users working with large data sets. SAS Visual Analytics on

Viya helps users of all skill levels explore data and create visualizations that present the insight they need.

"It basically suggests the best visualization to the user as they're adding to the pallet," Mitchell says. "We're really guiding them toward using the best and most appropriate visualization as they bring more and more data in."

BNE decided at the outset that the new enterprise data system would be designed to serve multiple departments and functions. Once marketing was up to speed, loss prevention began exploring it to spot exceptions, something it found was easier to do with visual capabilities, Haley says. Loss prevention can now modify reports and quickly and easily put specific pools of data into a visual format. As a result, the department can better identify things such as overuse of expired or non-applicable coupons, credit card fraud, abuse of the employee meal program and instances of cashiers putting money straight in their pockets.

"Before, it was very hard to detect some of these things," Haley says. "Instead of having to use the same reports again, they can go down and modify them, change them. We put a tool in place called Decision Maker that easily allows them to change the criteria on the reports that we run for them daily."

BNE may soon find other applications in finance, supply chain management, human resources, training and compliance, Haley says. The POS system is now integrating all employee information on hours and training so requirements can be consolidated. As an IT person whose role it is to support and serve the technological capabilities of the organization, Haley has defined success by end-user satisfaction. "The goal is to open up this service to every department within our organization," he says. "We've already identified use cases for most of them." **STORES**

Craig Guillot is based in New Orleans and writes about retail, real estate, business and personal finance. Read more of his work at www. craigdguillot.com.