



# PRIVATELY HELD RETAIL CHAIN: SOA / BPM / BI

## ORGANIZATION

The Client is leading privately held grocery supermarket chain operating over 300 stores in 3 states across the south-eastern United States.

The client had outsourced its in-store demo events planning and execution to a third party provider. Client business users did not have access to the providers planning system. Most of the planning steps and interactions with the third party vendor were manual and involved several spreadsheets resulting in:

- Planning cycles and options limited by the ability of the outsourcing vendor and vendor systems
- Unable to get the optimal lift at individual stores or store segments due to in flexibility of the third party systems and processes
- Unable to leverage best offers from vendors due to lack of what-if analysis capabilities and supporting data and processes
- High cost for managing and planning events
- Labor-intensive planning process
- Lengthy events planning cycle
- A fragmented view of all events
- Inaccurate reporting and invoicing to product vendors
- Additional time and resources for manual reconciliation of invoices
- Lack of historical planning data due to outsourcing of event planning

## CHALLENGE

The heterogeneous nature of IT systems between the Client and 3rd party provider caused the events planning process to be inconvenient to product vendors. It also resulted in inefficient execution of events at the store level. Event planning required experience and guesswork, as data for historical events was not available for analysis.

As part of an initiative to expand its in-store demo event planning and execution capabilities the client created their own centralized events planning data store and system.

## THE TECHNICAL SCENARIO WAS CHARACTERIZED BY THE FOLLOWING:

### TECHNICAL LANDSCAPE

- No centralized application for events planning - all planning tasks executed manually based on Excel spreadsheet templates
- Data required for events planning in disparate systems
- Batch oriented rudimentary integration to accounting system for invoicing vendors
- Batch oriented rudimentary integration with Supply Chain and Direct-Store-Delivery systems
- Store reporting for participating items handled manually via fax of receipts
- No integration with data warehouse and no reports for performance analysis of events

## KEY COMPONENTS

### TECHNOLOGIES USED

XTIVIA Workflow Framework (HWF)  
 TIBCO™ - iProcess; BusinessWorks;  
 EMS  
 Java Struts  
 Oracle®  
 Teradata®  
 Microstrategy®





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## SOLUTION

XTIVIA proposed and delivered a composite solution that automated the Client Event Planning processes and integrated with their existing business systems and enterprise data warehouse. XTIVIA's approach leveraged best practices from SOA, BPM, BI, and utilized XTIVIA Workflow Framework (XWF) a framework for automating business process and workflows and for implementing user friendly interfaces for executing and managing the processes.

SOA - Considering the vast amount of information distributed across 7 different business systems, each one implemented in different technologies and platforms, the solution demanded an approach that would avoid multiple data entry points, eliminate data discrepancy issues, and appear seamless across all systems and users. SOA provided the key enablers to meet these requirements and provided the client a means to leverage existing systems and data. XTIVIA designed and developed all the services for managing the items, vendors, demand forecasts, supply chain processes, store information, segmentation information, etc.

These services enabled seamless integration between the legacy systems and provided a high degree of transparency and location independence.

BPM and XTIVIA Workflow Framework - The conceived solution required implementation of complex and diverse business processes common to the retail industry. The solution required more than 100 user interface screens to automate several workflows and manage multiple entities like stores, vendors, offers, events, users, invoices and so forth.

Such a solution demanded a component based loosely coupled architecture that could be implemented by teams working globally. HWF is perfectly suited for such workflow automations. HWF segregates the user interface from the workflow and the information management logic. All workflow logic was implemented as workflow services. All information management was implemented as Application Services. The UI was implemented in JSP. HWF provided the glue to orchestrate the services that would be managed and executed through the front end. The solution automated the event planning, budgeting, execution, and invoicing workflows.

### THE SOLUTION CONSISTED OF:

- Centralizing the events planning application and data repository
- Connecting all the stakeholders in the events vendors, planners, supply chain, stores and business unit heads through the central application
- Automating workflows for end-to-end event planning process
- Creating services for data look-ups and systems integration
- Integration of the application data with the enterprise Data Warehouse
- Enhancing the monitoring, reporting, and analysis of events

## RESULTS

XTIVIA helps client organizations focus on the business the core products and services that make a direct impact on the bottom-line, by using business process integration and application integration. The benefits of this particular initiative for the client included:

- Reducing the total time and costs for planning demonstration events by approximately two thirds
- In house events planning and operations enabled newer and flexible offerings resulting in higher lift due to the events
- Increased visibility and reliability of Demo events for the vendors
- Enabled use of the best-offer for the event
- Visibility to all planned events allowing for event optimization
- Business users are able to work on the right set of data attributes reducing expensive mistakes
- Significant time savings for business users to focus more on their core business rather than on making a fragmented process work
- A reusable service to be used for any future application eliminating future costs

