



## The Client:

Mann's was founded in 1939 in Salinas, California. A family business for three generations, this majority women owned and operated firm focuses on quality and sustainability. A lead year-round supplier of fresh vegetables for wholesale, foodservice, and retail markets, their business is expanding. They needed to implement a system to supercharge their sales force, with accurate quotes that could be generated on the go.

## The Challenge:

To take existing Microsoft Excel Pro Forma workbooks and make a user friendly Access application that would allow better input, export, organization, and consolidated reporting of business critical data as the company expanded. To quickly generate accurate quotes is vital, and with multiple variables to take into consideration, streamlining the process for their sales force was the task for our team.

A business can not fully flourish when there are inefficiencies in a system. We entered into a dialogue with our customers, assessed their needs, reviewed their documents, analyzed their systems, and developed a menu driven End User application to meet their specific end requirements.

## The Solution:

Our clients had an in-depth Pro Forma structure, which was maintained through the process, albeit with a new uniformity, for their extensive sales base. Learning a vastly different system takes time and cuts profits but ExcelHelp built on what currently worked and lessened the learning curve. We cut redundancies, added new data fields, and built into their template a protected product worksheet that was created from a database update.

Information security was also a concern. There were multiple levels of access to company information, and so in our updating of the system, we made it possible for global data update and built in security features. Decision makers need instant access to information with protection from updates and other users. Managers have the ability to view and update Excel Pro Forma data and a user authentication and authorization protects sensitive data.

We also allowed for consolidated annual report generation. Pro Forma data is organized into historical and current years, better for drawing comparisons and future year Pro Forma bases can be forecast using "What-ifs" scenarios. This information, now available quickly, allows the client to function at full speed.

Time saving, money saving, and information forward is what our client requested. We took the time to listen and provided them with exactly what they needed.



## Key Client Benefits:

Our consolidation of Pro Forma data gives Mann's management instant pictures of product performance and sales data, company-wide. Informed managers make better decisions and not only is Mann's more efficient since implementing our solutions, they are more effective as well.

