

Bongards Creameries

Utilizing Aptean Smart Hub
to Save Time, Streamline
Processes and Drive Continual
Improvement

Industry

Food & Beverage

Challenges

- » Manual processes consuming team members' valuable time and leaving room for error
- » Lack of visibility across multiple solutions for different operational areas
- » Need for greater insight into potential issues before problems occur

Benefits

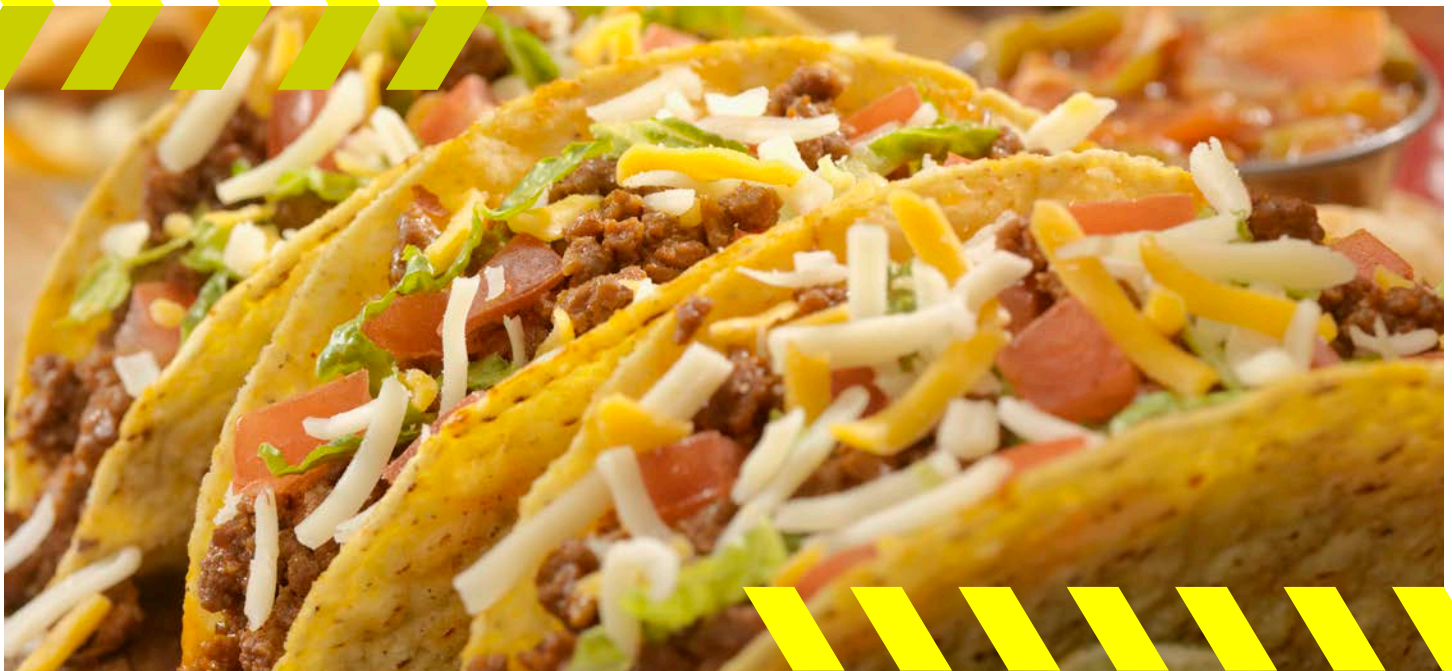
- » Time saved and mistakes prevented thanks to intelligent, automated processes
- » Cohesive solution ecosystem via integrations between platforms
- » Automatic alerts based on predefined criteria keep employees in-the-know



Founded in 1908 in the small southern Minnesota town that gave the business its name, Bongards Creameries is a 300-farmer co-op with more than a century of dairy expertise. Now headquartered in Chanhassen, Minnesota, the organization is a vertically-integrated global supplier of both natural and processed cheeses, as well as powdered whey, with hundreds of millions of pounds of finished goods manufactured at two Minnesota production facilities and a third in Tennessee.

The company's clients range from foodservice distributors to commercial restaurants, retail delis, schools and convenience stores. Bongards has been a satisfied Aptean Process Manufacturing ERP client for a number of years, but in the process of growing and expanding the company's tech stack over time, key internal decision-makers identified a need for greater connectivity between the numerous applications and platforms utilized by employees.

That's why the leadership team chose to implement Aptean Smart Hub, a solution designed to automate processes, enable system integrations, promote data accessibility and increase collaboration across an entire organization. Bongards' staff have leveraged it more and more over eight years of use to tie together various software and web services while also automating tedious manual processes.



Realizing the Benefits of Smart Hub: Automations

Bongards quickly unlocked considerable benefits thanks to the decision to deploy Smart Hub, but that was only the beginning. The solution has had a positive impact across a number of operational areas via automations, and the business continues to unlock additional operational advantages as staff leverage new features and functionalities.

Accounting and Finance

In the past, Bongards' accounts receivable team was burdened with some very time-intensive manual tasks. Now, Smart Hub has enabled a new auto-invoicing process that has saved approximately 23 hours of work in a three-month period while also helping to prevent mistakes in manual data entry.

“Depending on the month, auto-invoicing could save over two and a half weeks of one person’s time, and we don’t have any errors due to typing in the wrong dispatch number,” said Judy Jacques, accounts receivable manager at Bongards. “We also have reports in place to let us know why an invoice did not process. We can more closely focus on collecting money, and we are more efficient and take on more within the department rather than asking for help.”

That means more time spent on identifying and managing exceptions, helping to make the organization’s approach more proactive and oriented toward solving problems before they occur. Plus, two other automated processes built with Smart Hub take care of uploading invoices to the Document Connect service so there’s a record of them in the ERP system, as well as emailing them and the associated bills of lading to customers.

“That would be basic clerk work for people who are accounting specialists,” said Bob Grinsell, IT business analyst. “Smart Hub allows them to put their time to a much more valuable use. It alleviates the need for them to act as data handlers, letting them actively investigate and correct the root causes of issues.”

Distribution, Shipping and Logistics

The company is also seeing improvement in distribution with automations. Managing orders, accepting bids and scheduling deliveries are all streamlined when information doesn't have to be manually transferred from one system to another. That's critical for a manufacturer with such a large network of different carriers and customers, all with their own unique needs.

"Shipping and logistics has improved thanks to the automatic sharing of data between Aptean Process Manufacturing ERP and our transportation management system (TMS)," said George Johnson, IT director at Bongards. "Smart Hub integrates the two and automates what were once manual processes so our employees don't have to worry about entering manual orders."

Customer Service

On the customer service front, automating price adjustments has freed up time for employees to concentrate on addressing concerns and strengthening relationships. Staff members are able to be more effective in their roles now that they don't have to identify what special rates might be applicable on a client-by-client basis.

"Our team is not having to manually adjust prices or keep track of all the different programs, incentives and rebates based on size, specific products or other factors," said Grinsell. "It would be very difficult for them to manage that while they're doing customer order entry and things of that nature, but the new process eliminates them having to even deal with that information."

What's more, working with one of Bongards' biggest clients—the U.S. Department of Agriculture—has been simplified with a Smart Hub automation. Before, the fact that dairy products are classified as commodities and are therefore subject to price fluctuations between the time of order and fulfillment was a tough challenge to overcome, especially with the volume of products that the USDA purchases.

"Now, we use Smart Hub to grab their spreadsheet of orders, upload it into the system and adjust the prices so that our customer service representatives don't have to manually do that," said Johnson. "I know that was taking a long period of time to do since that's around 50 orders a month they'd have to manage and adjust."

Realizing the Benefits of Smart Hub: Alerts and Third-Party Integrations

Beyond automations, Smart Hub has also delivered on its value proposition for Bongards with the deployment of automatic alerts and third-party integrations. The former helps the business's teams stay ahead of potential complications—like a customer reaching their credit limit—and come to a solution that works for all parties involved.

"Now they don't have to spend a lot of time monitoring and looking through an entire list to see who might be getting close to their credit limit," said Grinsell. "We can reach out to a customer about an issue ahead of time instead of waiting for something to blow up or the customer to tell us that they're upset about something."

The company has also set up alerts for data hosted in Document Connect, using pre-defined criteria to flag errors and resolve discrepancies in official records. This helps to ensure that the internal database is accurate and also promotes client satisfaction by keeping orders, inventory and financials aligned with expectations.

"It helps alert staff to certain situations," said Johnson. "It looks at the data, analyzes it and alerts certain team members if conditions are met. We didn't have that capability before Smart Hub—we didn't have any system at all that would look at data and send out a notification to alert someone."

Even more alerts—for order status, new customer setup, past due invoices, electronic data interchange (EDI) issues, financial period rollovers and more—help keep workers in the know, engaged and on top of urgent matters. As an organization, Bongards is benefitting from faster response time and enhanced visibility.

Meanwhile, the aforementioned integrations help keep all parts of the company on the same page and relieve individual workers of having to manually re-enter information when moving from one system to another. After working with Aptean's solution specialists to successfully make the initial link between the ERP and TMS, several other systems have been seamlessly integrated as well.

That includes integrations with Bongards' customer contract, sales tracking and operating efficiency solutions, as well as the platforms the internal teams use to manage auto-guided vehicles, component analysis equipment and carton labeling technology. Even routine banking operations can be handled in what is now a much more cohesive and connected setup.

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Bob Grinsell, IT Business Analyst, Bongards Creameries

Looking Forward and Sharing Wisdom

In the future, Bongards hopes to be able to deploy an additional automated alert for inventory minimums so that key personnel always have the materials needed and don't run low on supplies at an inopportune moment. Smart Hub will help the business's procurement specialists know exactly which ingredients they need to generate purchase orders more precisely and quickly than before.

There may be other integrations down the road as well depending on which services the organization may need as they continue to expand and serve a larger customer base. Thankfully, the internal

team has expertise in structured query language (SQL), which makes setting up just about any process—for carrying data from one system to another or deploying a new alert—a simple matter.

Bongards' staff members can also iterate on previous Smart Hub automations and alerts via the solution's knowledge repository and user-friendly, intuitive interface. That means it won't take an undue amount of effort to deploy additional proactive, time-saving processes that make the organization a better, more consistent business.

“You don't have to continually reinvent the wheel,” said Grinsell. “You can take an existing customization and modify it to do something else. You're not starting from scratch on everything you want to achieve—there's a whole library of things you can reference and use to implement something a lot more efficiently and a lot faster.”

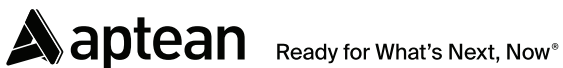
And of course, the folks at Bongards know they can always count on Aptean's customer service teams to help them navigate whatever changes or additions the future may necessitate.



Are You Ready to Learn More?

Discover how Apteian Smart Hub can help your company streamline processes and promote efficiency.

Contact us today or request a personalized demo.



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