

# Joseph Gallo Farms

Collaboration leads to improvements beyond software for Joseph Gallo Farms



## Industry

Food & Beverage

## Challenges

- » Current software solution became increasingly outdated
- » Lagging when it comes to modern technology

## Benefits


- » Leveraging out-of-the-box features specifically designed for food companies
- » Mobile solution, which allows users to record information via mobile hand-held units
- » Gaining a lot more efficiencies in other areas of the business

## A Tradition of Quality

Joseph Gallo Farms, maker of Joseph Farms cheese, became one of the largest dairy operations in the world due to the dreams of one man, Joseph E. Gallo. Born in 1919 in central California, Joseph grew up tending to his family's vineyards and ranches. In 1946, he realized his dream of getting into the dairy business with the official founding of Joseph Gallo Farms. Joseph continued to expand, eventually owning 25,000 heifers and 25,000 bulls, making Joseph Gallo Farms the largest dairy in the world. A move into cheese-making was a natural progression, and the company's first manufacturing plant was constructed in 1982.

Joseph Gallo Farms quickly established itself as a visionary leader in the industry, becoming the first American cheese manufacturer to be granted governmental approval to label its products as containing no artificial hormones. This forward-thinking mindset has not come at the expense of quality: its jack, mozzarella, provolone, and various cheddars have received more than 160 different awards and recognitions in the past decade alone. The company's award-winning Joseph Farms cheeses are enjoyed across the United States, Mexico, and around the world.

Today, Joseph's legacy continues with his son Michael and Michael's son, Peter, putting Joseph Gallo Farms solidly into its third generation of success and commitment to high-quality cheeses.



“With Aptean, it was clear we found an organization with expertise, both in terms of the food industry and in terms of consultancy and best practices. There was a great connection with Aptean. They genuinely care and have always been responsive to our needs and requests.”

**Pete Lundrigan**, Director of IT and Automation at Joseph Gallo Farms



## Time for a Change

Understanding the importance of software in maintaining the company's standards of excellence, the people at Joseph Gallo Farms were no strangers to the enterprise resource planning (ERP) tools that bring all areas of business together under one platform. In 2005, the company began working with a version of Microsoft's ERP solution for mid-sized businesses, Dynamics NAV, that had been configured to support the food industry. While the software had been cutting edge when they first deployed it, as the years passed the version of NAV they were using became increasingly outdated, to the point that it was no longer supported by Microsoft. In 2013, the IT and management teams began to seriously look at an upgrade.

When it came to the software itself, Joseph Gallo Farms did not have to search far. Users had been comfortable with the Dynamics NAV application, and, after determining that the current version of NAV was as intuitive and flexible as their old software, it was only logical that they would continue to work with it.

The real search was on the services side. Joseph Gallo Farms had grown dissatisfied with their existing software provider, and wanted to find an organization that would be able to meet their commitment to improving processes and staying up to date. As Pete Lundrigan, the Director of IT and Automation at Joseph Gallo Farms, explains, “We sought a partner that was well-versed in the food industry, responsive to client needs, and strong in development in Dynamics NAV.”

Joseph Gallo Farms found an organization that met all three of those requirements in Aptean. With more than 30 years of experience implementing ERP solutions for food processors, manufacturers, and distributors, Aptean, along with their food-focused vertical add-on to NAV, Aptean Food & Beverage ERP *bcFood Edition*, immediately impressed Joseph Gallo Farms with both their industry expertise and their commitment to doing the right thing for their customers.

Joseph Gallo Farms acted upon the connection they felt with Aptean and chose them to be their software provider, confident that Aptean's experience would allow them to design an ERP system around their business processes.

## The Implementation Process: Collaboration Breeds Success

Although Joseph Gallo Farms had been working with NAV prior to engaging with Aptean, the changes that had been made to the software over the years meant that they were effectively dealing with a new product. And while Aptean Food & Beverage ERP contained the same industry-specific features as their old vertical add-on, there were of course differences that would need to be reviewed. The team at Joseph Gallo Farms approached their new software with an open mind – committed to making choices that set the company up for future efficiencies and success, as opposed to merely re-inventing their legacy system.

The implementation of Aptean Food & Beverage ERP at Joseph Gallo Farms was a collaborative process every step of the way. The users at Joseph Gallo Farms were eager and willing to get involved and did not shy away from the responsibilities involved with successfully implementing an ERP solution like Aptean Food & Beverage ERP. As the two companies reviewed Aptean Food & Beverage ERP *bcFood Edition's* out-of-the-box capabilities against the business needs of Joseph Gallo Farms, they would identify areas that required a unique solution, then work together to find the optimal result.

“There are so many different ways to approach an issue,” explains Steve Reynolds, Senior Implementer at Aptean. “Maybe you make a change to the software, maybe you adjust your business process. The implementation at Joseph Gallo Farms was great because they were so involved in working alongside us to figure out the best course of action. There was never any sort of ‘you figure it out and get back to us with a solution’ mandate. The users were as active in their implementation as could be.”

Although Joseph Gallo Farms went live with Aptean Food & Beverage ERP *bcFood Edition* in February 2015, this spirit of collaboration lives on to this day.



“Joseph Gallo Farms has a lot of complex and interesting parts to their business. The key question from a software perspective, then, is ‘how do you present what are very complex and intricate processes in as streamlined and easy-to-use way as possible?’ Aptean Food & Beverage ERP *bcFood Edition* was able to meet this challenge.”

**Steve Reynolds**, Senior Implementer at Aptean


# Extensive Features for Inventory and Warehouse Control

Joseph Gallo Farms was able to leverage the out-of-the-box features in Aptean Food & Beverage ERP that were designed specifically for companies like them. Nowhere was this more apparent than in the area of inventory control and warehouse management.

With Aptean Food & Beverage ERP bcFood Edition's license plating capabilities, Joseph Gallo Farms would obtain tight control and visibility of their warehouse contents. License plating makes it possible for users to define pallets and their contents, then track these pallets throughout the warehouse. This significantly streamlines warehouse movement activities, as users need to enter or scan just a single pallet number, rather than identify every individual case or block of cheese that is stored upon it.

Another component of Aptean Food & Beverage ERP that was especially important to Joseph Gallo Farms was its catch weighting feature. Catch weighting permits the recording of exact weights on variable weight items. This weight is recorded alongside a primary unit of measure, making it possible to simultaneously maintain an item according to two different units. In practice, this allows Joseph Gallo Farms to produce, move, and sell cheese by the block, but price each block according to its exact weight.

Possibly the most significant improvement to performing warehouse activities was the implementation of Aptean's Mobile solution, which allows users to record information via mobile hand-held units through an interface that connects directly to NAV. By implementing mobile devices with barcode scanning capabilities, Joseph Gallo Farms gave their users the ability to capture data from the warehouse floor in real-time, ensuring instantaneous, error-free updates to the available quantity and location of their items.



“We continue to meet with Aptean to talk about the new features we want to implement, and it's very much a joint effort. We work through various approaches, explore the pros and cons of each, and arrive at a solution together. It's truly a partnership.”

**Pete Lundrigan**, Director of IT and Automation at Joseph Gallo Farms



## Improvements Beyond Software

The combination of a collaborative partnership in approaching issues and the extensive feature set of Aptean Food & Beverage ERP resulted in a positive end for the Joseph Gallo Farms implementation. The company has benefited greatly from the integrated nature of Aptean Food & Beverage ERP; while the software stretches across all areas of business, everything remains part of one solution, with the data that is recorded in one particular area influencing activities and transactions elsewhere in the environment. This presents users with what is sometimes referred to as “a single version of the truth.” No longer relying on external spreadsheets or other disconnected sources of data, users can have complete faith in the data that they are pulling from their system.

Joseph Gallo Farms has also been able to use the technology in their newer version of NAV to do things that would never have been possible with their old system. They have taken tremendous advantage of the Power BI capabilities supported by NAV, producing informative reports and dashboards that allow managers in all areas of the business to see critical data in real-time and make necessary business decisions.

The benefits to Joseph Gallo Farms extend beyond the obvious improvements brought about by their new ERP system, however. As a result of the evaluation of their business during the implementation, Joseph Gallo Farms has worked together with Aptean to improve processes in areas that have nothing to do with software, be it the execution of new procedures or finding more efficient ways to do things. As Pete explains, “The implementation caused us to look at many of our people processes and ask, ‘Is there a better way we can achieve this?’ We gained a lot more efficiencies in other areas of our business just by considering them over the course of the implementation.”

“One critical aspect of the implementation at Joseph Gallo Farms was the warehouse. For Joseph Gallo Farms, it was, and continues to be, critical that everyone be able to get to what it is that they need, be it raw materials for production or picking finished goods for shipments to customers.”


**Steve Reynolds**, Senior Implementer at Aptean



## Full Speed Ahead

A critical lesson that the staff at Joseph Gallo Farms learned throughout the implementation was the value of more frequently upgrading their ERP system. By staying with their original NAV system for as long as possible, they ended up with a version that was no longer supported by Microsoft and severely lagging when it came to modern technology.

“We don’t plan on repeating that pattern going forward,” vows Pete. “We’re committed to staying current with the technology.” As of 2018, Joseph Gallo Farms is exploring an upgrade of their Aptean Food & Beverage ERP solution to the latest version of NAV, which is being re-branded by Microsoft as “Business Central.” By upgrading on a more frequent cycle, the upgrades themselves will be smaller undertakings, and users will not be overwhelmed with entirely new interfaces and features.



“Our Aptean Food & Beverage ERP *bcFood Edition* implementation has made Joseph Gallo Farms a much better company. The visibility the system gives us to our on-hand inventory has allowed us to take great strides in utilizing our warehouse in an efficient way as possible.”

**Pete Lundrigan**, Director of IT and Automation at Joseph Gallo Farms



Beyond large projects like software upgrades, Joseph Gallo Farms is continually tweaking and improving Aptean Food & Beverage ERP to allow them to do more and accommodate new business objectives. The company is implementing improvements to their cheese block production lines' scale processing interfaces with the aim of reducing human interaction, ultimately allowing them to produce more blocks in a day. Joseph Gallo Farms has also deployed Aptean's EDI application, which will significantly reduce the time between the receipt of a customer's purchase order and its conversion to a sales order in NAV. In addition to improving efficiencies, this automated conversion will make data entry mistakes a thing of the past.

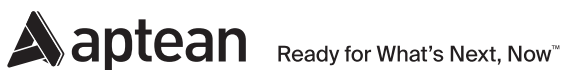
Regardless of what changes and projects lie down the road, Joseph Gallo Farms can rest easy knowing that, in Aptean Food & Beverage ERP, they have a software solution and a business partner that will allow them to reach their goals.



## Are You Ready to Learn More?

Interested to see how Aptean can help your food business?

Contact us at [info@aptean.com](mailto:info@aptean.com) or visit [www.aptean.com](http://www.aptean.com).



### About Aptean

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