

# OUTSIDE OF THE BOX, NOT OFF THE SHELF.

## OASIS SOLUTIONS + HEINE BROTHERS' COFFEE

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Jessica Lord, Director of Finance

In October 1994, the original Heine Brothers' shop opened its doors in the Highlands neighborhood, offering 100% fair trade and organic coffee to the Louisville market. Founded on a commitment to operate responsibly and sustainably, Heine Brothers' is a founding member of the world's first fair-trade coffee buying cooperative. Today, they are a \$12M company with 15 retail locations along with a warehouse, roastery, and offices, all situated in Kentuckiana.

### CURRENT SYSTEM LOSES STEAM

In late summer 2017, Jessica Lord, Director of Finance, realized QuickBooks could no longer scale with the increase in their production and orders. “We were shipping 200,000 lbs. of coffee roasted per year and using an Excel spreadsheet for inventory management with 54 external documents. It was time for change.”

With growth aspirations to increase their retail footprint by one to two new stores per year over the next three years while also expanding their wholesale business once a second roastery opens, Jessica knew it was time to look for a more robust business management system that could scale with the growth of the company while also keeping their back office a lean operation.



### HEINE BROTHERS' & OASIS: THE PERFECT BLEND

Heine Brothers' required an ERP solution and a partner that could handle the complexities of their inventory, manufacturing, and accounting needs, as well as integrate to their point of sale system and a partner that would be by their side in a multi-phase implementation. Oasis and NetSuite were the perfect blend.

Once the Heine Brothers' team had partnered with Oasis, the Oasis team reaffirmed their decision to move to NetSuite, supporting them and guiding them through the implementation process.

“Oasis provided a bridge between our operations and NetSuite. We have a lean team and don't have a dedicated IT team. Oasis helped us merge our operations and work flows into NetSuite. By partnering with Oasis, we were able to position ourselves with a product that could grow with us,” said Jessica Lord, Director of Finance. “We trusted them to make a recommendation as to how we were going to fit into the system.”

“We were looking at other software providers prior to NetSuite, but the deciding factor on NetSuite was the inventory management functionality. NetSuite allows us to accomplish a physical count at store level and real time inventory at the roastery for over 550 SKUs,” says Jessica.

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## A LATTE BENEFITS GAINED

Jessica noted that once the team was really comfortable, they started seeing benefits of the change. Oasis worked alongside Heine Brothers, configuring the system and training their team to provide the dynamic visibility into their operations that their old disparate combination of QuickBooks and spreadsheets couldn't provide. With NetSuite, Oasis helped Heine provide Key Performance Indicator dashboards for managers to better understand the profitability of their store. Heine Brothers' runs an "open book" philosophy and wants their managers to have the data required to make their stores more profitable.

For Jessica, the greatest impact has been gained from the insights that she has with NetSuite's superior data capture and reporting. "The #1 question in a financial system change seems to be: did you reduce your days to close? Our period end close is certainly much more efficient, but the greatest gain has been the accuracy of the inventory and financials. Prior to NetSuite I could spend days researching inventory discrepancies. With the heavy reliance on Excel, nine times out of ten it was related to a formula error. Those pickups are harder to value. Now I have access to multi-store/side by side reports, rather than having to open up 14 different spreadsheets trying to figure out the inventory discrepancies and/or formula issues. The old system was purely housing transactional data. Now we have accurate reports, inventory management and an abundance of other features."

With NetSuite, Jessica is well-positioned when going into vendor negotiations, with a report of highest turning items instead of relying on the vendors to supply her with annual purchase reports. NetSuite also provides Heine Brothers' better security and internal controls, allowing Jessica to switch system access off immediately when a manager leaves the company.



## WHAT'S BREWING NEXT

Now, Heine Brothers' and Oasis are looking forward to tackling the second phase of their project together. "Because our team is lean—and we are learning this really robust product of NetSuite—last year we rolled out the most basic accounting and inventory management to start. Now, a whole year later, we are looking at the other features we had the intent to roll out over time (warehouse model, close, work orders, warehouse management functionality)," said Jessica. "To start this, Oasis is going to come out and do a project analysis—an "A day in the life of" and look at work flows in the roastery, how we package and distribute in the roastery, and our overall production processes. The first year with basic accounting and inventory management has been a valuable time to learn NetSuite and tighten up our workflows. We are now well positioned and ready to dive into Phase II of the project."

With the help of Oasis and NetSuite, Heine Brothers' is in a solution that is going to allow them to support the upward growth pattern of the company.

"We needed a system that would continue to change with us—we couldn't continue down this path if our accounting and inventory management system is not going to be able to keep up with us. We want to continue to grow into it and we can do that with NetSuite," said Jessica.

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