



## How Rental One Replaced Complex Excel-Based Processes with Robust Analytics

### Background

Rental One, located in Colleyville, Texas, is a premier equipment rental company, who provides their customers locally and state-wide with a broad selection of the best construction equipment and the most personalized service possible. By way of 11 retail locations, customers from a wide range of markets can take advantage of Rental One's vast industry experience, and will benefit from partnering with an organization who promises to deliver exceptional solutions.

While the organization has evolved and grown ten-fold since it began as a family-run business over 6 decades ago, its commitment to excellence and belief that good work relies on dependability, integrity, honesty and teamwork, has never wavered. Rental One continues to support its customer's projects regardless of equipment, supply, or service need.

### Their Needs

Rental One maintained an enormous Excel spreadsheet with millions of rows across multiple sheets that tracked key performance indicators (KPIs) for financial data company-wide for both retail store managers and executives. This Excel spreadsheet had lived within the organization for countless years, and housed all the data responsible for supporting key decisions.

On a weekly basis, Rental One would export data from their ERP to their existing Excel spreadsheet, and while this process was partially automated, the majority of content was added manually. As the number of variables and quantity of content increased, the spreadsheet continued to accumulate data, expand, and become more cumbersome. At month's end, additional consolidations were prepared to provide an executive review of the business performance.

**What the Excel spreadsheet fundamentally lacked as it grew, was reliability.** Rental One noticed that their long-time running Excel-based process continued to produce incorrect results, and different users reached different conclusions based on how the spreadsheet was

interpreted and which data stacks they ran. Rental One had reached a point where as it stood, their Excel-based system was grinding to a halt and impacting multiple facets of the business. To rectify this problem, which was snowballing out of control, Steve Glaeser, Senior Systems Analyst at Rental One, was tasked with reverse-engineering the spreadsheet and re-creating it using a Business Intelligence (BI) platform.

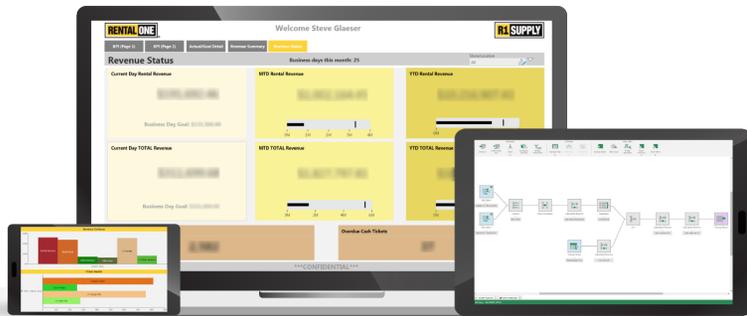
### Their Solution

Rental One's Excel-based processes were not nearly efficient or scalable enough, and they required a Business Intelligence platform that could negate Excel's shortcomings, unlock and consolidate data from their ERP, simplify ad-hoc queries, and automatically produce correct, consistent results for everyone in the organization. Adding complexity to their search, Rental One felt they needed to implement a BI solution that wouldn't compromise the integrity of their data, and would perform amply in scenarios of greater intricacy such as when dealing with large quantities of data prep steps. This was pivotal, as they required a solution with the ability to automate ETL processes that were traditionally performed manually in Excel; an innate capability of Dundas BI.

As the search for the ideal solution intensified, and the pool narrowed to 20 vendors (including Tableau, Sisense, Qlik, and Microsoft), Dundas stood out from the competition for a myriad of reasons. Primarily for its long-standing leadership in the data visualization space, and for its ability to fulfil Rental One's key requirements specifically in regards to advanced data prep, but also for its commitment to enable and ensure the success of Rental One. Dundas' Professional Services team exhibited a dedication to coach and guide Rental One that was unmatched by its competition.

It's for these reasons that Dundas BI was chosen by Rental One as the BI solution to replace their Excel-based processes.

# Why Rental One Chose Dundas BI™



## ✓ Unified Data Layer

Using Data Cubes within Dundas BI, Rental One was able to define how their data would be broken up into measures and hierarchies, regardless of its original source. Multiple transformations were used at this level to perform data cleansing, join data from different sources and ensure the data used for analysis was precise, error-free and automated. Dundas BI's advanced data prep capabilities allowed Rental One to be more proactive, and focus on the data they needed, and from there, easily enrich it.

## ✓ Real-Time Interactive Analytics

With Dundas BI, Rental One acquired the ability to retrieve data directly from its sources on regular intervals. This meant they could display their data in real-time on their dashboards, providing users with unfettered access to stored information and empowering them to track KPIs down to the minute.

## ✓ Tailored User Experience

When Rental One began their search for a BI platform, it was imperative they found one that could implement user-dependent filtering, and display data only to users with particular attributes. Using Dundas BI's security hierarchies, Rental One was able to set specific user privileges at the data model level, to ensure that store managers and executives can only access the data they should be privy to no matter which dashboard they access.

## ✓ Advanced Data Analytics

Dundas BI features advanced interactivity and intuitive data discovery operations via simple point-and-click or drag-and-drop actions. This made it easier for Rental One to refine available data for use, interact with multi-dimensional hierarchies, setup contextual metrics to support period-over-period analysis, and analyze data faster.

## Key Benefits

Prior to implementing Dundas BI, the process of tracking KPIs for Rental One was historically one month delayed, at best 2 weeks. Store managers and executives were at the mercy of the Finance team and could not begin to construct dashboards from their Excel spreadsheet until financial results were posted and published. At this point, they'd work for 6 business days constructing an Excel dashboard to display their KPIs and one additional day determining how to accurately distribute the content, ensuring the correct data consumer received it. **Dundas BI eliminated this process entirely, replacing a mammoth Excel spreadsheet with a single dashboard that updates in real-time.** Now, Rental One's store managers and executives can see these KPIs immediately, at any time, and easily refer to any previous period.

Of the reports Rental One developed in Dundas BI, it's possible that none had the impact automating their 500+ page Accounts Receivables Aging report had. The ROI was immediately apparent with these reports, as Rental One was able to easily sort and visualize where collections needed to be made. With these reports, Rental One also **saved the equivalent of 1.5 man-days per month of report creation.** Prior to implementing Dundas BI, the data they'd compile was incredibly difficult to obtain and consolidate, and the process was painstakingly manual. By the time the reports were finally delivered to the respective end-users, the information was at best, stale. The ability to filter and sort the Dundas dashboard dynamically enables the dashboard users to prioritize collection calls and speak definitively about the account status, not only creating insight into the data, but also facilitating simple cleanups for small dollars trapped in transactions that nobody could see quickly. Rental One leveraged Dundas BI's ability to integrate into their ERP, giving their users the ability to focus on critical factors and manage far more effectively.

In addition to the quantifiable benefits Rental One has enjoyed, the intangibles have been nearly as remarkable. In particular, Rental One has noticed a distinct cultural shift among store managers, and it's evident they're more aligned with the dashboards in Dundas BI than in Excel. With Dundas BI, they're able to more effectively manage staffing needs to store revenue, and can visualize store revenues by sales categories, overdue contracts, and thumbnail views of fleet utilization. By having greater insight into the data pertinent to their success, they're able to more consistently attain the KPIs set for them. Current projects continue to strip hours of clerical effort previously consumed managing Excel workbooks that can be now performed with real-time results in just seconds.



*"It's Excel on steroids for an ERP report that runs over 500 physical printed pages"*

*– Steve Glaeser, Senior Systems Analyst, Rental One*

## Final Statements

Excel works until it doesn't, and for Rental One, it simply stopped working. This paved the way for the acquisition of a Business Intelligence solution that would make millions of rows of data highly accessible across the entire organization, and allow store managers and executives to make key decisions based on accurate information.