

Transitioning from Grid Reports to Dashboards & Mobile



Einstein Bros. Bagels

einsteinbros.com

Location

Lakewood, CO

Industry

Food & Beverages

Employees

5,000+

Annual Revenue

\$400 million+

Partner

MicroStrategy

The Client

Einstein Bros. Bagels is the largest operator of bagel bakeries, with over 795 company owned, franchised, and licensed locations.

The Problem

This multi-concept restaurant operator was experiencing the “spreadmart” phenomenon, with accounting department manually creating and distributing grid-based excel reports to operations so they can manage their stores.

The client wanted to create a single version of the truth for enterprise reporting, consolidate multiple reporting tools, and eliminate these massive and manually generated spreadsheets. In addition, they wanted to move from grid-based reports to visual analytics, and enable executives and field leadership with mobile access to critical information and performance dashboards.

The Solution

Leveraging FoodOps BI solution accelerator, Smartbridge team designed, developed, integrated and launched Mobile dashboards for the executive team, finance, and regional operations executives. The project was executed following an agile BI approach to deliver continuous value to the business in a rapid manner.

FoodOps is a standardized food industry analytics solution accelerator built based on decades of industry expertise in QSR, fast casual and full service segments. It comes with pre-defined data models, KPIs, dashboards and micro apps to digitally enable typical food field operations.

- Reviewed existing reports and conducted interviews with key Finance and Operations resources to identify the key elements they gravitate towards on existing grid reports
- Structured a 3-sprint plan for layering incremental functionality over time
- Conducted iterative mockups (paper > PowerPoint > MicroStrategy)
- Designed the overall look and feel, built all visual and navigation graphical components
- Migrated FoodOps into the client’s environment and conducted a schema object mapping exercise to “re-wire” FoodOps components to their data warehouse
- Developed the MicroStrategy dashboards, and drove testing/QA effort



Example of a FoodOps dashboard (mobile view)

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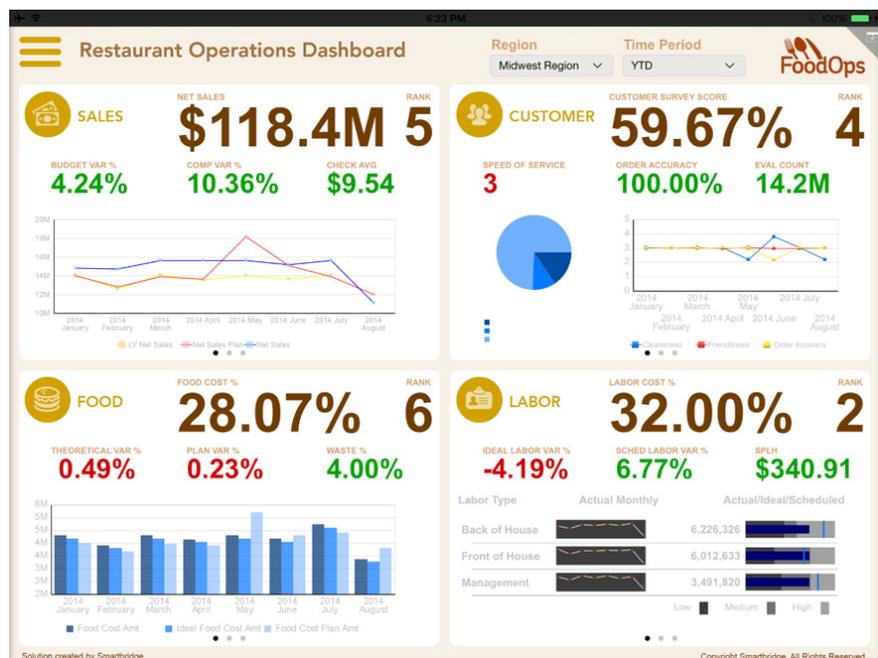
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Example of a FoodOps dashboard (tablet view)

The Result

The features allocated to the 3 sprints (store information, geographical store performance, and period-level financial reporting) were delivered successfully, and we completed the project on-time and under budget. Multiple touch-points with end users during sprint execution yielded an extremely relevant solution, and the solution was successfully deployed to the pilot users.

Overall feedback from field users and executives was extremely positive, and created an increase in the demand for new features and enhancements (which have been added to the backlog). The results achieved in the initial phase led to strategic executive decisions to enhance the company's BI capabilities and transform the company to an information-driven decision making organization.