

Store Associates control and improve gross margins, inventory levels, item pricing and operational expenses for a better bottom line.

Petro-Canada deployed Profitbase Retail Business Intelligence to provide their convenience store Associates with web-accessed daily updates of financial and product sales reports that provides them with the detailed information they needed to optimize the performance of their stores. "The Profitbase solution allows us to quickly provide our stores the detailed financial and sales reports they needed to monitor and improve performance," notes Ken McLaughlin, Manager, Retail Systems and Support for Petro-Canada. Prior to the Profitbase deployment, store Associates received monthly reports that did not provide the level of detail they needed to optimize performance or provide comparisons to plans or prior periods.

Synergistic Relationship

Petro-Canada, the retail unit of Suncor Energy Inc, operates over 800 convenience stores throughout Canada under the *SuperStop* and *Neighbours* store brands. The stores are owned by Petro-Canada and are managed independently by Associates who own their inventory and manage the day-to-day operations. Store Associates are able to hire their own staffs, purchase, set prices and manage inventory based on their needs. The Petro-Canada retail group provides the brick and mortar, branding, marketing, IT infrastructure, category management and management training and guidance.

Improve Reports and Performance

Petro-Canada deployed Microsoft Dynamics™ AX in 2006 as the primary business system for their retail Associates. All financial and sales transactions are captured and stored in a central database. Due to the high transaction volumes and size of the database, reporting functionality was limited to preserve the performance of the production system. Additionally, the reports did not provide the level of detail needed, or the flexibility to do what-if or comparative performance analysis. Therefore the decision was made to deploy a data warehouse that would be used exclusively for reporting and business intelligence. "Our goal was to provide reports that were updated daily over the web and provide the ability for our



Petro-Canada SuperStop Store

store Associates to filter, sort, drill to detail, and compare performance to a same period last month, last quarter and last year," McLaughlin adds.

Financial and Retail Metrics - AX Connectivity

Petro-Canada began a search for a data warehouse / reporting solution in 2007 and selected Profitbase. "We selected Profitbase for several reasons including the fact that they supported Microsoft 100%; had a rich set of out-of-the box financial and retail metrics; had a pre-defined connector to Dynamics AX; and their deployment software, Profitbase Studio, was easy to use," notes McLaughlin.

"The Profitbase solution allows us to quickly provide our store Associates the detailed financial and sales reports they needed to monitor and improve performance. Reports are accessed through a browser and allow users to filter, sort, drill to detail and compare performance between stores and prior periods."

*Ken McLaughlin
Manager, Retail System and Support*

Solution Deployment

Petro-Canada deployed the Profitbase solution in a few months. The team consisted of a Petro-Canada IT Analyst and a part-time Profitbase consultant. Data is extracted from Dynamics AX for each of the more than 800 stores and consolidated in the Microsoft SQL Server™ data warehouse and OLAP Cubes are processed. A web-based reporting system pulls the information from the Cubes and presents to each store Associate, only the financial reports associated with the stores they manage. Reports are refreshed every night so that Associates have fresh

information daily. "With Profitbase Studio, our IT staff was able to deploy the solution very quickly. Now, as we are using the system, we continue to enhance the reports based on feedback from the stakeholders. Making modifications to any calculations or filtering criteria is done with Profitbase Studio," notes McLaughlin.

Better Information - Better Store Performance

The Petro-Canada store Associates began using the web-based reports in early 2009 and immediately liked the fact that data was refreshed daily and they had a level of detail they never had before. Store Associates are most interested in their cash flow, which means they must closely manage inventory levels; understand the impact of promotions and price changes; and manage operating expenses, receivables and payables. They are also able to compare performance to prior months, quarters and years, analyse trends and make course corrections. The Profitbase solution also simplified access to information for multi-unit operators. These Associates can now compare performance across all stores they are responsible for.

Future Plans

"We are continuously receiving feedback from all our stakeholders. One area of focus in the near term is to provide analytics to our store Associates around our PETRO-POINTS loyalty program and promotional campaign execution. Store Associates and their staff are key to the success of our loyalty program. Metrics on how they are executing offers at the store level will help us to continually improve," concludes McLaughlin.



Petro-Canada SuperStop Express Store

About Profitbase

Profitbase, a Microsoft Gold Certified Partner, is a technology leader in delivering rapidly deployed business intelligence (BI) and planning solutions to retailers, manufacturers, and many other markets throughout the world. Their solutions provides a rich set of pre-defined industry specific metrics and key performance indicators resulting in one consolidated view and 360 degree visibility to all aspects of business performance, empowering decision makers to improve cash flow, turnover and profit margins.