Shellfish Farm Synchronizes Daily Harvest with Order Data to Avoid Lost Sales

Overview

Country or Region: United States
Industry: Agriculture, fisheries

Customer Profile

Taylor Shellfish Farms, the West Coast's largest producer of farmed shellfish, farms more than 12,000 acres of tidelands and distributes clams, oysters, mussels, and geoducks around the world.

Business Situation

Taylor Shellfish gets sales data from daily phone calls, but can only harvest when shellfish are ready and only during low tides.

Solution

Microsoft Dynamics™ GP 10.0 with Microsoft® SQL Server™ 2005 Reporting Services gives executives daily reports on sales, so growing and harvesting decisions can be more effectively managed.

Benefits

- Complete view of operations
- Efficient operation reduces workload
- Lean staffing cuts costs

> "We now get daily reports, pushed out to our executives ... telling us exactly what's been sold and to whom, so we can get the best possible estimate on what we need to harvest the next day."
>
> Steve Marsh, Controller, Taylor Shellfish Farms

Taylor Shellfish Farms in Shelton, Washington, is the West Coast's largest producer of oysters, clams, and other shellfish food products. The company's sales rely on daily phone calls from wholesalers, grocery chains, and restaurants, but harvesting depends on the growing cycles of shellfish and can only take place when low tides make the beds available for harvest. An incorrect prediction about the demand for shellfish on a particular day might mean lost sales or even wasted shellfish. To manage this cycle, Taylor Shellfish turned to Microsoft Dynamics™ GP 10.0 and Microsoft® Gold Certified Partner ICAN Software Solutions to link sales reports, harvest schedules, and workflow. Microsoft Dynamics GP 10.0 gives top management up-to-date visibility into daily operations and a much stronger ability to match long-term growing operations and daily harvests with future demand.

"I estimate we spend about $30,000 on Microsoft Dynamics GP, and it saves us at least $60,000 a year in labor costs alone."

Steve Marsh, Controller, Taylor Shellfish Farms

Situation

Taylor Shellfish Farms, located in the South Puget Sound city of Shelton, Washington, is the nation's largest producer of clams, oysters, mussels, and geoducks. Taylor Shellfish has been owned and operated by the Taylor family for more than 100 years. The family's sustained efforts have resulted in a modern company with about 400 employees; 12,000 acres of owned and leased tidelands in Washington, Mexico, and British Columbia; a distribution company in Hong Kong; and a Fijian pearl farm based in Savusavu, Fiji.

Shellfish farming is a labor-intensive, nature-dependent business driven by Mother Nature's version of a just-in-time harvest schedule. Orders arrive daily by phone, fax, or online, but harvest plans must take into account the long growing cycles for clams, oysters, mussels, and other shellfish. The shellfish are harvested by hand, and only low tides allow access to the harvest beds.

"If we estimate that we're going to need 1,000 dozen of Pacific Oysters, for example, we'll harvest that many. If the orders come in and we need 1,200 dozen, we have to turn down some of those orders or allocate fewer oysters to some customers," explains Steve Marsh, Controller for Taylor Shellfish. "If we harvest too many and the orders don't come in, the product may be wasted because it can't be shipped as fresh—and we may not have enough oysters to meet demand the next day."

Marsh continues, "Our managers have to have their hands on the pulse of the business, asking 'How much did we sell today and to whom?' We can sell over 100,000 pounds of clams in a week. That's all done by hand, and we've got to be managing what's pulled off the beach."

To manage this risky, constantly changing business, Taylor Shellfish needed a business management system flexible and fast enough to give executives access to daily information about sales and orders. They also needed a system that was robust enough to integrate with database information about the harvest beds—and their growing schedules—and harvest work schedules.

Solution

Having previously implemented Microsoft Dynamics™ GP, Taylor Shellfish turned to Microsoft® Gold Certified Partner ICAN Software Solutions to customize and fine tune the system to deliver the financial and operational control that Taylor Shellfish needed. After Taylor Shellfish upgraded existing systems to Microsoft Dynamics GP 10.0, ICAN helped Taylor Shellfish to integrate its Web-based time reporting and payroll systems. In addition, ICAN developed SQL-based reporting that provides managers with much-needed insight into the business.

David Eichner, President of ICAN Software Solutions, has worked with Taylor Shellfish through several versions of Microsoft Dynamics GP, keeping systems current and helping the company find new ways to streamline operations through technology.

Recently, Taylor Shellfish integrated Microsoft Dynamics GP 10.0 with Microsoft SQL Server™ 2005 Reporting Services to provide even greater visibility into all aspects of the business.

"Implementing the new version was not difficult at all," says Jorge Cortes-Monroy, Information & Technology Director for Taylor Shellfish. "The new user interface makes our system look like a familiar Microsoft Office application."

"The combination of Microsoft Dynamics GP 10.0 and Microsoft SQL Server 2005 Reporting Services gives our key executives

much more flexibility over the information they can get from our system," Marsh says. "With Microsoft Dynamics GP 10.0, our executives can choose what they want to know about—how much we have sold in the last five days, the last 10 days, whatever they want to see—and they can select that criteria and get the information they want on the spot."

Marsh adds, "We now get daily reports pushed out to our executives every day at three o'clock telling us exactly what's been sold and to whom, so we can get the best possible estimate on what we need to harvest the next day."

Eichner identifies the integrations of Microsoft Dynamics GP with the payroll system and Microsoft Dynamics GP with Microsoft Dynamics Retail Management System (RMS) as just two examples of Taylor Shellfish taking advantage of Microsoft products and technologies to automate processes across functions.

For Taylor Shellfish, Eichner originally integrated Microsoft Dynamics GP with a Microsoft Office Access™ database, and now with Microsoft SQL Server 2005, to enable managers at sites throughout the Pacific Rim to enter time and pay information for their workers. The system replaces a manual process that was redundant and fraught with errors. "We started by integrating a payroll function, using an intranet template that allowed the company managers to key in payroll data that would then be integrated into Microsoft Dynamics GP," Eichner says. "The payroll function worked so well that they didn't have to fill a vacant position."

Taylor Shellfish is already planning to take advantage of other new improvements in Microsoft Dynamics GP 10.0 to publish reports and data online through Microsoft Office SharePoint® Server 2007, making

operational data even more readily available to company managers.

"Some of our sales information is on spreadsheets in several locations," Marsh says. "Microsoft Dynamics GP 10.0 linked with Office SharePoint Server 2007 will allow our sales staff throughout the company to get up-to-the-minute sales information wherever they're located. That will be a huge improvement."

Benefits

Microsoft Dynamics GP helps Taylor Shellfish executives get a clearer, up-to-date picture of company operations. This allows the company to cut costs, reduce workload, and eliminate the manual entry of sales and order data.

Complete View of Operations

Taylor Shellfish gains a vastly improved ability for managers to see a clear picture of daily and long-term operations from Microsoft Dynamics GP 10.0. This visibility has a direct impact on the company's top line. "With Microsoft Dynamics GP 10.0, our executives get daily sales reports. Before, they had to call salespeople in the field, because we sell around the world, sometimes in the middle of the night, to get information we needed to make harvest decisions," Marsh says. The result of this new complete view of operations is fewer lost sales and fewer shellfish harvested prematurely.

Visibility also helps Taylor Shellfish maintain profitability in other aspects of its operations. Although sales at the company's two retail stores are only a small part of Taylor Shellfish's revenue, the company uses Microsoft Dynamics RMS, linked with Microsoft Dynamics GP 10.0 and Microsoft SQL Server 2005 Reporting Services to give the company a much clearer picture of its retail business. "We used to get sales reports from our retail operations only once a month.

Now those sales reports come in every day, updated within the last hour," Marsh says.

Efficient Operation Reduces Workload

Microsoft Dynamics GP 10.0 has enabled Taylor Shellfish to automate processes that had been performed manually in the past, reducing time spent on data entry and eliminating opportunities for clerical error. "Integration between Microsoft Dynamics GP 10.0 and Microsoft SQL Server 2005 Reporting Services has cut my workload down," Marsh says. "I used to spend a day and a half every month just checking things off to make sure they were entered into the system accurately. Now, Microsoft SQL Server 2005 Reporting Services has simplified the process by allowing flexible report generation."

Marsh continues, "We used to manually process about 350 invoices a week. Now our suppliers send us the information in a Microsoft Office Excel® spreadsheet and the information is automatically pulled into Microsoft Dynamics GP 10.0—with more than 600 accounts payable transactions—in less than five minutes, start to finish."

Lean Staffing Cuts Costs

Microsoft Dynamics GP 10.0 and Microsoft SQL Server 2005 allow Taylor Shellfish to run its business more efficiently and save money. "I estimate we spend about $30,000 on Microsoft Dynamics GP 10.0, and it saves us at least $60,000 a year in labor costs alone." Marsh says. "Our business has grown more than 60 percent in the past three years, up to $35 million a year in sales, but we haven't needed to add anyone to our accounting and IT team. With Microsoft Dynamics GP 10.0, we expect to have even more growth in the future—with the same team of six."

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