

# A Sales Planning Treat for Jel Sert

Jel Sert, a maker of high-quality food and beverage products, had a slow, disjointed and inefficient sales planning model that prevented them from focusing on high-level sales analytics. With Prophix, Jel Sert is able to budget and forecast detailed sales for top customers and at a summary level for other customers. This process is controlled by the district sales manager (DSM) using Prophix workflows.

---

## Business Challenges

Jel Sert was not able to consolidate detailed budget data and issue timely and accurate financial statements with their former system. It quickly became difficult for Jel Sert to manage their data and plan and forecast at the appropriate level.

## Why Prophix?

Jel Sert chose Prophix because it enabled them to migrate their monthly financial reporting, including expense allocations, to an improved financial model. This model is used to conduct annual planning, monthly forecasting and reporting of over 500 individual SKUs in five product categories to 800+ retailers with thousands of ship-to locations.

Jel Sert is a family-owned manufacturer and nationwide distributor of freezable novelties, powdered soft drink mixes, desserts and ready-to-drink beverages.

**Operating:** Since 1926

**Website:** [www.jelsert.com](http://www.jelsert.com)

**Annual Revenue:** >250 million USD

**Employees:** >1,000

**ERP:** QAD



## Results

With Prophix, Jel Sert can import the cost of goods sold from Excel by month at the category level. Manufacturing and distribution overheads are built using existing Excel templates and then seamlessly imported by account and month; these costs are then allocated to five different categories.

Sales, general and administrative budgets are also completed via Excel and then imported by account and month into Jel Sert's master financial model. Jel Sert's Office of Finance can also complete sales budgeting in their Prophix sales planning model; totals by category are then pulled into their master financial model. One person is dedicated to sales forecasting and communicates directly with their DSMs monthly using Prophix dashboards.

They can also analyze unit volumes and net sales by SKU, by sales channel, by category, and by customer over time and relative to the budget for each year. Prophix also gives them the ability to analyze average net prices (ANP) on a monthly basis relative to multiple budget years because trade spending programs can vary greatly.

Plant personnel planning in support of labor standards and operations/distribution overhead is conducted by employee, by month in their personnel planning model. Summary totals by month by department/category are then imported into their master financial model. Their Office of Finance can also budget for indirect labor over-time by employee instead of job title category.

Jel Sert also calculates current and future wage increases for union personnel to analyze the financial impact on the company.

## Future Plans

Jel Sert plans to expand their operational planning capabilities using Prophix. They also plan to invest in eliminating Excel templates for overhead spending and have managers input spending projections directly into Prophix. Improved personnel planning also presents an opportunity to import actual payroll against budget for variance analysis.

## About Prophix

Your business is evolving. And the way you plan your business activities and report on them should evolve too. To empower mid-market companies to achieve their goals, Prophix provides an integrated, cloud-based platform to the Office of Finance; one that delivers planning, budgeting, reporting, forecasting and consolidation solutions. With Prophix, finance leaders improve profitability and minimize risk and puts the focus back on what matters most – uncovering business opportunities. Prophix supports your future with AI innovations that adapts to meet your strategic realities, today and tomorrow. Over 2,500 active customers around the globe rely on Prophix to transform the way they work.



[www.prophix.com](http://www.prophix.com)

### Prophix Head Office

350 Burnhamthorpe Road W,  
Suite 1000 · Mississauga, Ontario  
Canada · L5B 3J1

+1 (905) 279 8711  
1 (800) 387 5915  
[info@prophix.com](mailto:info@prophix.com)

### Other Offices

United States  
United Kingdom  
Belgium  
Denmark  
France  
Germany  
Italy  
Luxembourg

The Netherlands  
Portugal  
Spain  
Indonesia  
Malaysia  
Singapore  
Brazil