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CASE STUDY

SM JALEEL & COMPANY
Beverage Manufacturing

"Like other global manufacturers, we face issues relating to culture, foreign currency, availability of raw materials, and a skilled and educated labor force. However, we like to view these issues as opportunities to grow the business rather than challenges."

George Gobin, CIO, SM Jaleel & Company, Ltd.

SM Jaleel & Company Ltd., also known as SMJ, is the largest manufacturer of non-alcoholic drinks in the Caribbean. Founded in 1924, and headquartered in Trinidad and Tobago, their beverages are distributed to over 64 countries worldwide. Through months of rigorous audits, testing, and process mapping, SMJ became the first company in the Caribbean to gain SQF Level 2 Certification, the highest standard of manufacturing quality.

SMJ produces juices, carbonated soft drinks, iced tea, energy drinks, water, milk and flavored water. Some of SMJ's well-known brands in the Caribbean region include Chubby, Busta and Fruta. SMJ was previously using MACOLA for business management, but quickly outgrew its capabilities, as there was a lack of local support. In addition, the requirements and expectations of SMJ grew as it moved into the procurement of raw materials, manufacturing, warehousing, distribution and route management. The team knew it needed to upgrade to a more powerful business solution to better meet customer and supplier demand.

Key Benefits

> **Powerful business solution meets customer and supplier demand**

> **Data warehouse allows for access to transaction history**

> **Helps increase profits and decrease expenses**

> **Consolidated GL and Chart of Accounts across companies and locations**

> **Previous month's financial Information presented within the first three days of next month**

> **Company has received quality and innovation awards**

> **Prepared for product recall with traceability**

> **Power BI allows for mobile, informed decision making**

After performing an internal needs assessment and compiling an RFP, SMJ looked at Microsoft Axapta 4.0, as well as SAP, Oracle, EPICOR, JDE, and more. "In 2005, we selected Microsoft Axapta 4.0 because we saw that we would get the most bang for our buck in terms of business process automation, and integration," says George Gobin, CIO for SMJ. "Our decision was also influenced by the ability to have a mixture of local and foreign support, and it satisfied our need for multi-company, multi-geography, and multi-currency," continues Gobin.

Reengineered Implementation

SMJ initially implemented Microsoft Axapta 4.0 with another Microsoft partner, but terminated its agreement with the previous partner after an upgrade to 2009 did not go well. Microsoft Trinidad recommended they speak with Alithya. "Since Alithya got involved with us and reengineered the implementation, we've been quite happy," says Gobin. Alithya upgraded SMJ to Dynamics AX 2009, provided training, and brought the project in within planned timeframe and budget.

We have since been able to have conversations about next steps in our ERP journey, gain advice on re-implementing MRP to suit our new business imperatives and more recently, our planned migration path to D365 and the Cloud. They have proposed a data warehouse for the company that will take care of consolidating our data from previous and our current versions of AX as part of our D365 migration. "No other partner or company - not even Microsoft - had a data warehouse solution like the one Alithya proposed for us, which allows us to have access to the history of our transactions," says Gobin. "That I think stands out when it comes to why we're working with Alithya in terms of moving forward, and why they continue to be our trusted adviser and will continue to be our partner in the future," says Gobin. "Over the years we have really enjoyed this trusted advisor relationship with Alithya.

Positioning for the Future

Microsoft Dynamics AX is helping to position SMJ for the future. "Like any other company, we use [AX] as a valuable asset to grow our business," says Gobin.

"We're all interested in increasing profit, decreasing expenses, and providing our staff with a fulfilling experience while maintaining a safe and healthy environment. At the end of the day, we all want a software suite with support that helps us achieve that. Dynamics AX has provided us with the ability to record and process transactions within various modules, and also allows us to easily extract our financial statements and various management reports that are required for decision making," continues Gobin. In the past, financial information was held in disparate systems across the SMJ locations. Now, SMJ can use the AX features to query and perform analytics, by extracting data which is captured across multiple dimensions, cost centers, and locations. The system is well organized and grouped in accordance to reporting requirements and gives adequate flexibility to adapt to the continuously expanding level of operational activity, increasing product lines, growing chart of accounts and wider presence worldwide. AX gives SMJ the capability to meet financial deadlines, despite the fast pace, highly disruptive environment in which they function. This is done through the well-organized framework present in AX, which connects all activities from start to finish: purchasing, manufacturing, distribution, sales, payables, cash and bank, and ultimately reporting. The connection that is established from start to finish also preserves the level of governance and controls that are required for data integrity and on-time reporting which is also a major requirement for them.

In addition to SQF Level 2 Certification, SMJ was also awarded the most innovative product of the year award from the Trinidad & Tobago Manufacturers Association and the Trinidad Chamber of Commerce awarded the company for its accomplishment as the Largest Exporter of the year.

Up to Date Information

SMJ is also using Dynamics for Power BI reporting so that the Chairman has up to date information for all SMJ companies across the globe while on-the-go on his iPad for more informed decision-making.

"We're on the road to becoming a data-driven company and we want to be as technologically innovative as possible," says Gobin. "Microsoft Dynamics AX, and our future move to Microsoft Dynamics 365 in the cloud is going to get us there. We aren't there quite yet, but Alithya has not been pushing - they've been there ready to go with us when we make the decision, and we appreciate that."

Strict Industry Guidelines

Attaining its goal of making its brands global requires sticking to high standards, which ensure superior product quality. Bottling water, for example, is often assumed a simple process. However, there are strict industry guidelines that need to be adhered to when preparing and bottling water. SMJ follows USFDA international industry standards and guidelines, which ensures that its water products are high quality, safe for drinking, and taste great.

Product Recalls and Traceability

Product recalls and traceability are very important to SMJ as a food and beverage manufacturer. "Dynamics AX has automatic batch number generation which allows us to track and trace products based on what tanks produced that product, what lines, brought supply of the product, when we received it, the expiry dates, and more," says Gobin. "We track all of this information in Dynamics AX and we stamp each product with a Julian date and a production line number in order to perform traceability," continues Gobin. "Since we started this process, we have not had a product recall, but we perform our own internal testing every four to six weeks. We perform a mock recall using Dynamics AX, and it works every time. We hopefully will never have a recall, but we know that we are prepared if there ever is one," concludes Gobin.

"ALITHYA DIDN'T COME ACROSS AS WANTING TO BE JUST A VENDOR WITH US, BUT RATHER A TRUSTED ADVISOR AND PARTNER. THAT'S WHAT WE WERE LOOKING FOR. IN THE CARIBBEAN, LIKE MOST OTHER COUNTRIES, WE LOOK FOR RELATIONSHIP SELLING. WE THINK THAT IT'S IMPORTANT TO BUY FROM PEOPLE THAT WE KNOW AND TRUST AND ALITHYA FITS THAT BILL EXACTLY."

George Gobin, CIO, SM Jaleel & Company, Ltd.