

Award-winning New Zealand wine producer, Giesen Group, used Dynamics 365 Business Central and Solver to “right size” their technology footprint and modernise operations for improved efficiency

FORECASTING GOOD TIMES FOR GIESEN GROUP

Since its establishment in 1981 by brothers Theo, Alex and Marcel, the family-owned **Giesen Group** has become a New Zealand wine industry powerhouse. In just over 35 years it has become one of New Zealand’s top 10 producers by volume with distribution to markets all around the world.

With 18 vineyards throughout the Marlborough region of New Zealand, Giesen Group has built a reputation for its high-quality Marlborough Sauvignon Blanc, as well as several super premium wines. Still family owned after 35 years, Giesen Group prides itself on being good stewards of the land, New Zealand, and winemaking industry.



INDUSTRY

Food & Beverage

ERP

Microsoft Dynamics 365
Business Central

“ Everyone loves how easy and intuitive Solver is to use. Our finance team appreciates the workflow features that give us confidence that our numbers are accurate – and timely!

– **Shane Vivian**, Giesen Group



GETTING STARTED

Many years prior, Giesen Group had implemented Dynamics AX to manage wine production. Many larger competitors in the wine industry use SAP, which is more expensive and more complicated than AX, so by comparison, AX felt like a good fit.



THE SOLUTION

Once implemented, Giesen Group discovered that AX was unwieldy for what they really needed. Giesen Group's production processes and operations were relatively simple. So, when Microsoft announced a retirement date for Dynamics AX, Giesen Group decided to start looking for a new ERP solution.



Giesen Group wanted one system that could manage production, operations, and sales for a 12-person team. They also wanted an easy-to-use reporting tool to replace Atlas Reports. The new ERP and reporting solutions needed to be cloud-based. Beyond providing more flexibility for remote work for employees, Giesen Group wanted to cut operating costs.

After evaluating several ERP systems, Giesen Group decided to move to Dynamics 365 Business Central (BC). The Giesen Group evaluation team felt confident in Microsoft's commitment to innovation and the stability of the platform.

They liked that BC would easily integrate with Microsoft 365, SharePoint, Power BI – plus could be extended with well-vetted partner solutions, like Solver. By moving to BC and Solver, Giesen Group was able to retire servers and reduce capital costs. They're less reliant on the IT team for maintenance, security and support.

THE RESULTS

Building a Strong Financial Foundation

As part of the Dynamics BC implementation, Giesen Group seized the opportunity to simplify financial and operational processes. The project team worked together to create a better structured chart of accounts and reporting dimensions. They re-organised the vendor and customer lists, and created categories that were easier to manage. Vendor numbers, product numbers, SKU length were all standardised. Having uniformity across all records enabled Giesen Group to immediately identify items by just two digits. By matching Giesen's numbers with partner 3PL codes, less data transformation needed to be done as part of the API / EDI integration. The new numbering system was easier for employees to remember, and it made reporting and querying the system far simpler.



Easy Excel-Like Reporting

Using Solver with Dynamics BC provided Giesen with timely, flexible reporting. Their prior report writer required each report to be custom coded, which took expertise and consumed a lot of time. Users often reverted to using Excel instead of the old report writer, but that caused its own problems. Links would break between spreadsheets.

Formulas and input assumptions had to be constantly double-checked. Moving to Solver made it easy for employees to generate their own reports. Even Giesen executives have been known to run their own ad-hoc reports, saving the finance team a significant amount of time.

Forecasting the Future

Giesen Group uses Solver for forecasting various aspects of their business. By creating input templates with custom fields, they can run multiple scenarios to determine potential outcomes. For example, by entering the expected grape tonnage from each vineyard, sorted by varieties, and entering the extraction rate, they can forecast production. In another calculation, they can add market rates to forecast potential revenue. Giesen Group uses Solver to determine promotion costs and wine pricing to safeguard margins and company profitability. Workflows enable users to quickly change any assumptions and have confidence in the output.

Today, Giesen is looking at incorporating other system data into the Solver data warehouse to get more detailed reporting around production and manufacturing. Standardising on Microsoft 365, Teams, SharePoint and Power BI enables Giesen to quickly distribute Solver insights throughout the organisation.

“ Solver provided us with Excel-like simplicity, but better input flow. When you change a number in one place, that change is automatically reflected throughout the system.

– Shane Vivian, Giesen Group

