

A photograph of a Pilot Flying J gas station and travel center. The scene shows several gas pumps with red and yellow accents, a yellow pickup truck, and a white pickup truck. In the background, there is a building with a Subway restaurant and a Pilot Travel Center sign. The sky is clear and blue.

CASE STUDY

# Pilot Flying J refuels its analytics with Infor Birst

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Pilot Flying J, a Berkshire company, is the largest operator of travel centers in North America with more than 750 locations in 44 states and six Canadian provinces. Headquartered in Knoxville, Tennessee, the company employs more than 28,000 people. CEO Jimmy Haslam has embraced technology and moved Pilot Flying J in new directions, leading the company's growth from 1.1 billion fuel gallons sold in 1996 to more than 7 billion sold annually today. Pilot Flying J serves more than 1.6 million guests a day and is committed to connecting people and places with comfort, care, and a smile at every stop.

Pilot Flying J has transformed its analytical capabilities by implementing analytics from Infor, to provide joined-up analytics across all of its operational systems including financials, HCM, workforce management (October 2019 launch), and asset management (January 2020 launch). This has enabled all of Pilot Flying J's 28,000 employees to easily see the performance of the company and its travel center in real-time.



#### Headquarters

Knoxville, Tennessee, US

#### Operating revenue

US\$29.1 billion

#### Industry

Retail

#### Employees

28,000

#### Infor product

Infor® Birst, Infor CloudSuite™  
Financials, Infor CloudSuite  
HCM, Infor CloudSuite  
Workforce Management,  
Infor CloudSuite Distribution

#### Website

[pilotflyingj.com](http://pilotflyingj.com)

## Modernizing IT with Infor CloudSuites and Infor Birst

Two and a half years ago, Pilot Flying J embarked on an IT modernization program to replace 25 different IT systems. After evaluating multiple scenarios and their associated benefits, Pilot Flying J decided to replace many of its existing disparate systems with a suite of cloud-based Infor applications. Infor Ming.le® acts as the single portal its team members can use to access all Infor and third-party applications, including Infor CloudSuite HCM, CloudSuite Financials, CloudSuite Workforce Management, Birst analytics, and CloudSuite EAM, which are hosted in the cloud. Overall, Pilot Flying J's goal is to spend more time with its guests and for team members to spend less time on administrative or infrastructure-related activities.

Once many of the Infor applications were live, Pilot Flying J turned its attention to analytics. "We are a very metrics, ROI-driven company," says David Clothier, Vice President of Finance, Treasurer & Controller, CPA at Pilot Flying J. "We do not spend capital or write checks unless something makes financial sense to us and makes sense for our team members and guests."

With Birst, the plan was to replace a large and complex landscape of old, difficult-to-use legacy analytics tools, which had previously caused data analysis to be performed in silos. Pilot Flying J also wanted to integrate all of its Infor data with non-Infor sourced data to provide a more complete view of business performance and share that information with all 28,000 employees via a company portal called "PFJ Today".

Finally, Pilot Flying J required a single cloud platform that integrated operational reporting, dashboards, and self-service data discovery to cater for all types of users and analytical use cases.

**“ We have reduced our technical debt by replacing a proliferation of legacy and siloed reporting tools with a single, modern native cloud BI and analytics platform.”**

**DAVID CLOTHIER**

Vice President of Finance Treasurer & Controller, CPA, Pilot Flying J

### Business results and efficiencies

**\$500K**

Annual savings in report development and maintenance

**5 minutes**

Down from 4 days for month-end reporting (750 store P&Ls)

**5 seconds**

Down from 12 hours for month-end reporting (total company P&L)

**28,000**

Employees with real-time business performance

**500**

Legacy reports reduced to 30 reports

### Analytics for everyone

Giving all employees access to analytics is provided via Pilot Flying J's employee portal, built using Ming.le. A Birst widget embedded into the portal provides employees with an at-a-glance view of how the company is performing. By clicking on the widget, employees can open one of the first Birst dashboards developed by Pilot Flying J, which provides more detailed information on sales such as like-for-like reports for various timescales, and how sales is tracking against targets for fuel, deli, and restaurant.

From there, managers can drill into specific details around region, store, and products, which is accomplished either through detailed reports or visualizations, depending on the user's preference. Infor Birst's rich security features ensure that employees only see the information that they have access to, while regional managers get a broader view of their responsibilities.

The functionality in the Birst dashboards and reports not only provides a great deal of flexibility in enabling employees to understand how their store is performing and where they can focus their efforts, but it has also enabled Pilot Flying J to retire hundreds of legacy reports and reduce a considerable amount of technical debt.

One innovation of the new Birst dashboards is that Pilot Flying J has embedded sales best practices into the dashboards themselves to act as a coach to less experienced employees. If an employee notices that a product line is falling behind its sales target, the dashboard will advise key tips for achieving sales success.

## Mobile analytics create more time to smile, greet, and thank

Pilot Flying J takes the customer experience seriously. That's why Pilot Flying J's managers focus on hiring employees who can provide a great customer experience. However, you can't provide great customer service if you're stuck in a backroom reading reports.

Pilot Flying J has rolled out Birst mobile analytics to its store, restaurant, and regional executives so they can make data-driven decisions, while on the floor where they can ensure key products are on the shelves, talk to customers, and help everything run smoothly.

Employees can access store sales reports as well as profit and loss data on Apple® iPads® and mobile phones. Birst's consumer-grade user interface enables users of all skill levels to understand their contribution to sales and make immediate changes when required—without leaving the store front.

**“ Our lifeblood is the front line of the retail store. By providing our front-line workers with reporting at their fingertips, sales and customer service have improved. All our employees, including executives, look at the same numbers and make better decisions as a result. All of this value has definitely contributed to a positive ROI.”**

**DAVID CLOTHIER**

Vice President of Finance, Treasurer & Controller, CPA

## Partners in profit

Part of Pilot Flying J's employment benefits is a plan called “Partners in Profit” where employees get paid a percentage based on the profitability of their store. In the background, a sophisticated calculation takes place that considers information about the store based on location, size, and facilities, as well as an individual's role within the organization. That information requires data to be sourced from multiple systems, which is then embedded into Birst dashboards. With anytime access to view the dashboards, an employee can see what their “Partners in Profit” calculation looks like.

## Dashboards to plot the road ahead

In retail, the ability to quickly understand up-to-date sales and profitability and adjust business expenses is key. With Birst dashboards, Pilot Flying J can constantly monitor and forecast its sales performance to make fast, agile decisions regarding what the data says. For example, if a department sales forecast is not where it should be, managers can drill into the detailed data by region, division, or store to understand where any issues may lie. Armed with this information, real-time decisions can be made to ensure managers react immediately and are doing everything they can to maximize sales and minimize expenses to ensure that profitability is aligned with the latest sales forecast.

## Adaptive analytics

Before using Infor Birst as its main analytics platform, Pilot Flying J had a large selection of aging legacy tools that didn't provide a modern, flexible user experience. Critically, it was missing the ability to create pixel-perfect reports (often called operational reports) on the same platform as other analytical use cases, such as dashboards and data discovery. For financial reporting, pixel-perfect reports that allow complete control over report layout are an important requirement, but Pilot Flying J found that its existing tools could not offer that.

Also, with Birst, the company found that all of its analytical use cases could be met with one platform, providing a single definition of metrics and KPIs, as well as a single security model that handled the organizational structure.

Pilot Flying J recognized that it's important to provide an adaptive user experience to its users, especially since these users range from highly experienced financial managers to store personnel who are fresh out of college or the military that need and expect a more modern visual experience.

## Turbocharged reporting

Since adopting Birst for its financial reporting, Pilot Flying J has seen a dramatic improvement in the time taken to run the monthly close reports. A report is run for all 750 stores in the company. Before Birst, that process took over twelve hours, making it hard to re-run when changes happened. With Birst, the same workload takes five minutes. This has resulted not just in a huge leap in productivity, but it also means that the business can be more agile when making changes and updates. Best of all, Pilot Flying J can now see those results in a few minutes. As Clothier puts it, "It's changed my life, it's totally transformational."

## The road ahead

Pilot Flying J's use of Birst continues to grow rapidly. The company is evolving its vision for using analytics. A key feature of that will be the ability to combine information from all Pilot Flying J's Infor CloudSuites and provide a single location for analytics with the flexibility to combine data from finance, asset management, HCM, workforce management, and more onto a single dashboard quickly and easily.

Clothier says that the HCM data provides innovative ways of viewing financial and store performance data. For example, staff can analyze the effect of staff tenure on sales and profitability and different management practices, which can result in higher sales across the business. Pilot Flying J plans to use Birst's smart insights capabilities to derive hidden relationships in its data. By studying these relationships, Pilot Flying J can discover the real drivers of its KPIs through machine learning and AI. Birst's smart insights can automatically identify and build relevant analytics for users, removing many of the manual processes involved in report building.

Pilot Flying J passionately believes that connecting all of its 28,000 employees through analytics will help them become more knowledgeable about sales numbers and better understand their role in the organization's overall performance, which will have a significant and continuing impact on sales and profitability. Combined with the simplicity of Infor Birst, employees can focus on providing a great retail experience—instead of crunching numbers in a back office.

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