



CUSTOMER STORY

ANALYTICS



IT solutions provider leverages analytics to strengthen key industry partnerships



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Standing apart in a dynamic market

Resellers are a vital component of the IT ecosystem. They match solutions to needs and supply to demand, providing essential advice and support to buyers while also acting as the human face of the vendors whose equipment they sell.

And while these are all important aspects of its offering, Sterling is no ordinary reseller. Headquartered in North Sioux City, South Dakota, Sterling is a longstanding and trusted supplier to the US Federal Government as well as to various state and local government agencies; educational clients, including K-12 schools, colleges and universities and area education associations (AEAs); and to other assorted commercial/enterprise organizations.

Sterling is acutely aware that maintaining and building its position as a highly successful reseller involves much more than shifting thousands of boxes. Building a deep understanding and anticipation of the market across its supply chain—from vendor to end user—is critical to how the solutions provider operates and why it stands apart in a highly dynamic market.

“We’re fast to provide feedback and quotes, we’re accurate as to what a client’s requirements are and we provide competitive pricing,” says Jim Sobaski, Vice President of Operations at Sterling. “We also have tight relationships across the board, from vendors and sales to the technical side of the house.”

Solution Overview

Customer Name

Sterling

Industry

IT

Geography

North Sioux City, South Dakota, Americas

Function

IT, Finance, Sales, Supply Chain Management

Challenges

- Need to identify key areas for strategic business development
- Limited access to archived data for deeper analysis
- Desire to improve on limited Salesforce analytics capabilities

Solution

Sterling hired national consulting business Wipfli to implement an on-premises instance of Qlik Sense®, before eventually extending and upgrading to Qlik Sense SaaS.

Results

- New levels of data access deliver benefits across the business
- High-value insights provide ongoing value to partners and customers
- Accurate forecasting enables improved deployment of resources

A new analytics journey

Sterling has long recognized the importance of data and analytics in building its market intelligence. To that end, the technology company established a solid foundation from which to nurture its understanding. This foundation came in the form of Salesforce, which Sterling has used across its business since 2008, leveraging the CRM to access a comprehensive and rapidly growing depository of highly valuable data.

“Salesforce is our point of truth,” Sobaski explains. “We take other sources of data and input them into the tool. It doesn’t just handle contacts, opportunities and leads, either; it extends much deeper than that, a critical component to both top-level operations and more behind-the-scenes processes.”

There was, however, one area where Salesforce wasn’t meeting Sterling’s requirements. Its reporting capabilities were limited, falling short of the standards and aspirations the solutions provider had set for itself.

“The Operations team was often challenged with how to drive the business forward and build results,” says Sobaski. “Unfortunately, Salesforce archives some of your data, meaning that, after 12 months, you can’t access it via reporting, leading to limitations on year-over-year tracking. We spent time manually manipulating spreadsheets, effectively acting as a human ETL layer. It wasn’t efficient and, in 2018, we realized that we needed to move our analytics capabilities forward. That’s when we reached out to Qlik and Wipfli.”

Comfort and flexibility

Wipfli is an accounting and consulting business that works extensively across the US and other markets, with around 40 locations and 3,500 associates in total. Two of its key focus areas are mid-market clients and manufacturing as well as retail and distribution operators. It was, therefore, a perfect match for Sterling.

“It was clear from the outset that Sterling and Wipfli had a lot in common,” Sobaski notes. “They were fast with their responses; they were clear with their capabilities. They brought an excellent technical level of expertise and spent time to understand our business and needs. There was an instant level of comfort when dealing with Wipfli.”

Backing this up, however, were the capabilities of Qlik Sense. Connecting an on-premises installation to Salesforce was a relatively quick and straightforward

process for Wipfli. It also gave Sterling a powerful tool to access, process and present data that Salesforce couldn’t handle.

“We reviewed five or six different platforms, and it all boiled down to Qlik having the most flexibility,” says Alan Janssen, Operations Team Project Manager at Sterling. “We have a highly customized Salesforce instance, so the capabilities Qlik offered were very attractive.”

Every corner of the business

Within a couple of months, Qlik was creating opportunities and delivering results, chief of which was a huge resource of historical transaction data for Sterling and Qlik to interrogate and turn into new, highly valuable insights.

“We were able to really delve into deep, base-level reporting,” says Sobaski. “We built a series of data snapshots that became an ideal template for developing a methodology with which to better anticipate and pursue sales. We’re now in the 90-95% range in terms of forecast accuracy based on the new data we can collect and utilize.”

The effects quickly rippled across the business. Precise forecasting gave Sterling a clear indication of staffing needs, upcoming sales opportunities, supply requirements and purchase management. Before long, every department throughout the company was enjoying the benefits.

“We only have a handful of direct Qlik users, but by using Mail & Deploy, every corner of the business is consuming Qlik data,” says Lee Vondrak, Data Analyst at Sterling. “If Salesforce is the source of truth, Qlik is the channel through which people consume the analysis, forecasting and reporting.”

These implementations alone would have justified the transition to Qlik Sense, but Sterling had other ideas. By extending the analysis and sharing it with selected industry partners, Sterling could strengthen important relational links even further.

“Qlik—and the quality of data it allows us to share—helps set Sterling apart,” says Sobaski. “We recently presented to one of our partners and walked them through some of this reporting; it was, simply put, a real eye-opener for them. Building relationships with our partners is now the single biggest benefit of Qlik in terms of Sterling’s growth.”

All the answers

Growth is very much the operative word for Sterling. Since implementing Qlik, the business has increased both its revenue and margin by substantial degrees. "It's a result of a more strategic approach," says Sobaski. "Where do we spend time? How do we price deals? How do we build our business by helping partners build theirs? Qlik gives us all the answers."

It's also a continuing journey. Sterling has since migrated all its systems to the cloud in anticipation of new federal security requirements, and Qlik Sense SaaS provided the ideal solution for doing so. "It's a step up in many ways," says Janssen. "Instead of tracking patches and upgrades for our on-prem instance, we can rest easy in the knowledge that they're applied automatically."

Also automated are many of Sterling's reporting processes, which allows Operations to stay lean and personnel costs to remain under control. The recent addition of mobile functionality has also extended both implementation and adoption. "People love the mobile app because they can access it where and when they need it for any conversation they might be having," says Sobaski.

"We've done so much with Qlik, but we've really only scratched the surface," he concludes. "We asked a partner how we were doing, and they told us: 'Perfect. Nobody does it better.' It's just one example. But Qlik makes everyone's job easier, and that benefits us and, ultimately, our customers too."

**The
keys to
success**



Revenue

and margin growth



Deeper

industry partnerships

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Jim Sobaski, Vice President of Operations, Sterling



About Qlik

Qlik transforms complex data landscapes into actionable insights, driving strategic business outcomes. Serving over 40,000 global customers, our portfolio leverages advanced, enterprise-grade AI/ML and pervasive data quality. We excel in data integration and governance, offering comprehensive solutions that work with diverse data sources. Intuitive and real-time analytics from Qlik uncover hidden patterns, empowering teams to address complex challenges and seize new opportunities. Our AI/ML tools, both practical and scalable, lead to better decisions, faster. As strategic partners, our platform-agnostic technology and expertise make our customers more competitive.

[qlik.com](https://www.qlik.com)



About Wipfli

Wipfli LLP is a top 20 national advisory and accounting firm. Wipfli brings the curiosity needed to uncover what's been overlooked. Our ingenuity helps create unexpected results. Our team of more than 3,000 associates works together to bring integrated solutions to turn data into insights, optimize workflows, increase margins and transform through digital innovation. Others see problems. We see possibilities.

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