

Case Study: How The Jay Group Transformed Operational Intelligence and Customer Experience with Qlik and IPC Global

The Jay Group, a fast-scaling e-commerce, direct-to-consumer, and B2B fulfillment provider, recognized the need to modernize how it delivered information to clients and managed internal operations. Over time, the complexity of its multicustomer fulfillment model intensified the need for real-time visibility across order management, warehouse operations, financial performance, and service level commitments.

After years of incremental analytics adoption, 2024 marked a strategic relaunch of the organization's Qlik environment on Qlik Cloud, supported by IPC Global as the implementation and advisory partner. This modernization initiative fundamentally changed how The Jay Group delivers transparency to customers and how teams across finance, operations, and client services make daily decisions.



Business Context

The Jay Group supports consumer brands and major retailers by executing end-to-end fulfillment, including:

- Receiving and processing online orders
- Managing warehouse inventory
- Picking, packing, and shipping consumer orders
- Preparing large B2B shipments for retailers such as Target, Walmart, Costco, and Whole Foods



Clients depend on accurate, timely data to understand order status, inventory availability, shipment activity, labor performance, and SLA compliance. Historically, this required manual processes and account manager involvement, creating delays for customers and friction internally.

Why Qlik Became the Strategic Data Hub

The Jay Group had used Qlik for several years, but the organization's pivot to Qlik Cloud enabled a full-scale redesign of its analytics environment. The goal was to unify data from the wide range of operational systems into a single, near real-time decision engine.

Kate Golden, Vice President of Finance and Administration, explained the importance of this approach:

"We use Qlik as the point of data gathering for a multitude of systems. Through those connections, we are able to create the links between that data to provide us actionable insight in a near real-time scenario."

The result is a unified, scalable platform that supports customer visibility, operational performance, and financial management. This transformation moved The Jay Group from reactive, manual reporting to proactive, data-driven decision-making across every level of the organization.

Implementation Priorities



Customer Visibility

Real-time dashboards for clients



Operational Intelligence

Internal performance tracking



Financial Analysis

Profitability and cost management

Empower Customers with Real-Time Visibility

The first phase focused on creating a modern, intuitive, customer-facing analytics experience. This represented a fundamental shift in how The Jay Group engaged with clients, moving from reactive account management to proactive self-service transparency.

Prioritized Features

- Real-time order status
- Inventory levels
- Work order management
- Carrier and tracking data



"Before Qlik, we did not have information readily available to our customers. Qlik provides an easy way for our clients to access information in a near real-time environment."

— Kate Golden, VP of Finance and Administration

This transformation helped reduce the need for account manager intervention and improved satisfaction. Customers could now access critical operational data on demand, strengthening trust and reducing response time from hours or days to seconds.

Strengthen Internal Operational Intelligence

With the customer dashboards live, attention turned to internal operations. The Jay Group needed to equip managers, supervisors, and executives with the tools to monitor performance, identify bottlenecks, and optimize resource allocation in real time.

Labor Management

Forecasting workforce needs and tracking productivity across shifts and departments

Service Level Agreements

Monitoring SLA compliance and identifying risk areas before commitments are missed

Productivity Tracking

Measuring throughput, cycle times, and operational efficiency at granular levels

Executive Visibility

High-level dashboards for leadership to understand operational health at a glance

The unified Qlik environment gave teams the ability to react faster and make decisions with clarity. Instead of waiting for end-of-day or end-of-week reports, operational leaders could now monitor performance continuously and intervene immediately when issues emerged.

"It gives the ability to come in and see information faster, have it be more visually intuitive, with filtering capabilities that allow for quicker decisions."

3. Enable Detailed Financial and Performance Analysis

Integrating Qlik with key systems allowed The Jay Group to analyze profitability and performance across the business. This integration created a complete financial picture that extended beyond traditional accounting reports, connecting operational activity directly to financial outcomes.

This visibility is critical for making strategic decisions about resource allocation and capacity planning. The ability to analyze performance gives The Jay Group unprecedented control over their financial outcomes.

Adoption and Continuous Improvement



A major advantage of Qlik has been its usability. Teams across finance, operations, and client services can self-serve without dependency on IT. This democratization of data has accelerated decision-making and reduced bottlenecks throughout the organization.

"Our finance department can self-help. Our operations team and our client services team can self-help once everything is set up."

The Jay Group also uses Qlik's usage analytics to refine dashboards based on real customer behavior. This data-driven approach to analytics optimization allows the team to invest in areas that have the highest impact and avoid unnecessary development in unused areas.

Adoption and Continuous Improvement



Monitor Usage

Track which dashboards and features customers and internal users access most frequently



Analyze Patterns

Identify trends in user behavior and areas where additional functionality would add value



Optimize Experience

Refine dashboards, add new features, and remove underutilized elements to improve effectiveness



Iterate Continuously

Repeat the cycle to ensure the analytics environment evolves with business needs

This continuous improvement mindset ensures that the analytics platform remains relevant, valuable, and aligned with the evolving needs of both customers and internal stakeholders. Rather than treating analytics as a one-time project, The Jay Group has embedded optimization into their operational rhythm.

The Role of IPC Global

IPC Global served as the strategic partner through advisory, implementation, optimization, and ongoing support. Their role extended far beyond technical configuration, encompassing business analysis, change management, architecture design, and long-term strategic guidance.

Kate Golden identified several reasons IPC Global was critical to their success:

Business and Data Understanding

"The way IPC went about understanding our business and our data allows for an extremely quick stand up of new projects and tweaking existing projects."

IPC Global invested time upfront to understand The Jay Group's workflows, systems, and business model, which accelerated every subsequent phase of the project.

Consistent Relationship Management

The Jay Group benefitted from stable, knowledgeable resources who understood the business context, not just the technical environment. This consistency eliminated the need to repeatedly re-educate consultants and ensured institutional knowledge was preserved.

Having the same team members throughout the engagement created trust, improved communication, and enabled faster problem-solving.

Access to a Deep Bench of Expertise

"IPC is able to leverage their network of expertise... I will always recommend having an outside resource that has the broad network to pull from."

When specialized skills or additional capacity were needed, IPC Global could quickly bring in experts from across their team, ensuring The Jay Group always had the right resources at the right time.

IPC Global provided the agility, architecture leadership, and industry experience needed to modernize and scale the platform quickly. Their deep understanding of logistics, fulfillment, and supply chain analytics meant they could anticipate challenges, recommend best practices, and guide The Jay Group toward solutions that would scale as the business grew.

Lessons Learned for Other Organizations

Kate Golden's insights offer important guidance for other logistics-intensive businesses evaluating analytics modernization. These lessons can help organizations avoid common pitfalls and accelerate their own transformation journeys.

01

Understand your data keys before you build

"Understanding the data keys between multiple systems and having those mapped out before you start was critical."

This ensures scalable, reliable modeling across operational systems. Without clear data relationships, you risk building analytics that can't scale or integrate as new systems are added.

03

Enable end users, not just IT

Qlik lets operational teams self-serve, which accelerates adoption and increases impact. When business users can answer their own questions, they become more data-driven and less dependent on technical teams for every analysis.

02

Integrate all core operational systems

Building links across payroll, finance, WMS, OMS, and tracking systems unlocks complete operational intelligence. Siloed data leads to incomplete insights and forces teams to manually reconcile information across multiple sources.

04

Choose a partner who learns your business

A partner must understand your workflows, scale with you, and bring experience beyond the technology. The right partner acts as an extension of your team, not just a vendor delivering a product.

📌 **Key Takeaway:** Analytics modernization is as much about change management and business process design as it is about technology implementation. Organizations that invest in understanding their data architecture, integrating their systems, and empowering their users will see significantly better outcomes than those who treat analytics as purely a technical project.

Why Manufacturers, 3PLs, and Distributors Should Consider Qlik and IPC Global

The Jay Group's experience offers a clear signal to other supply chain organizations: modernizing analytics with Qlik and IPC Global is not an IT exercise. It is a transformation of visibility, decision-making, and customer experience that touches every aspect of the business.

Common Challenges Across the Industry

Companies across manufacturing, 3PL, and distribution share similar challenges that make analytics modernization both urgent and valuable:

Fragmented Systems

Multiple disconnected platforms make it difficult to get a complete operational picture

Complex Customer Demands

Clients expect detailed reporting and real-time visibility into their operations

Pressure to Deliver Transparency

Competition forces providers to differentiate through service quality and data accessibility

Labor Variability

Workforce planning and productivity management require real-time operational insight

Tight Margins

Competitive pricing pressures demand precise cost management and profitability analysis

Rising SLA Requirements

Contractual commitments require continuous monitoring and proactive issue resolution

Outcomes Delivered by Qlik and IPC Global

This case demonstrates how Qlik, paired with IPC Global's expertise, delivers transformative outcomes that address these challenges directly:

Real-time visibility across the entire order lifecycle

Essential for meeting on-time performance and managing customer expectations. From order receipt through final delivery, every stakeholder has access to current status information.

Integrated financial performance insight

Critical for understanding profitability at every level of the business. Connect operational activity directly to financial outcomes for better strategic decision-making.

Customer-facing dashboards that differentiate the brand

Providing transparency builds trust, reduces manual work, and strengthens relationships. Self-service analytics become a competitive advantage.

Operational Intelligence

An integrated analytics platform helps leaders quickly identify issues, manage labor, and optimize operations for improved throughput and efficiency

Scalable Architecture

As The Jay Group prepares for Qlik Answers and Qlik Predict, the foundation is already in place for AI and machine learning capabilities

Faster Time to Value

IPC Global brings specialized logistics, manufacturing, and supply chain analytics experience that accelerates deployment and ensures long-term success

Conclusion

The Jay Group's modernization journey shows how Qlik and IPC Global transformed customer transparency, operational control, and financial insight. What began as a modernization initiative became a competitive differentiator that strengthened customer relationships and empowered internal teams to make faster, better decisions.

For manufacturers, 3PLs, and distribution companies, this case study demonstrates how the right analytics platform and partner can unlock efficiency, drive better decisions, and position the organization for future growth powered by AI-assisted insights. The combination of Qlik's powerful analytics capabilities and IPC Global's deep industry expertise creates a foundation for sustained competitive advantage.

100+

Customers Supported

Analytics visibility across diverse client base

2024

Transformation Year

Strategic relaunch on Qlik Cloud

Real-time

Data Access

Near real-time insights across all operations

Ready to Transform Your Analytics?

The Jay Group's success with Qlik and IPC Global demonstrates what's possible when you combine powerful analytics technology with expert implementation and strategic guidance. If your organization faces similar challenges with operational visibility, customer transparency, or financial performance analysis, we can help you achieve similar results.

To learn more about the Jay Group visit: <https://www.jaygroup.com/>

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