Unifying ERP, CRM, Planning & Other Data

A Practical Guide for Manufacturers and Distributors
to Build a Trusted Reporting Foundation

Silvon
Driving The Intelligent Enterprise

Introduction

Today's manufacturers and distributors operate in a digital ecosystem powered by multiple systems — ERP platforms that manage transactional operations, CRM tools that track customer engagement, and planning systems that drive forecasting and scenario modeling. But when these systems operate in silos, data becomes fragmented. KPIs turn unreliable. Decisions stall or, worse, steer the business in the wrong direction.

This practical playbook outlines a proven 5-step path to unify your data and build a strong foundation for accurate, cross-functional reporting and performance analysis.

Step 1:
Identify Your Core Data Sources

Start by cataloging all the systems and data repositories your business relies on. This includes:

- **ERP systems** for transactions, inventory, and financials.
- **CRM systems** for customer accounts, pipelines, and service activity.
- **Planning platforms**, spreadsheets, or proprietary tools for sales forecasts, demand planning, and budgeting.
- **External sources** like retail POS systems.

What to Do:

- Conduct a data discovery workshop with business stakeholders to pinpoint key systems and the data they generate.
- Identify where critical data resides — such as order history, forecast
  inputs, customer transactions, pricing, and inventory.
- Prioritize systems to integrate based on reporting pain points and strategic initiatives (e.g., Is supply chain underperforming? Start there).

PRO TIP

Focus first on the systems that directly feed the KPIs you report on most often. Early wins build credibility for broader integration initiatives.

Step 2:

Define the Questions You Want to Answer

Before diving into technical integration, clarify why you're doing it. Understanding the questions your business is trying to answer helps define the data, logic, and structure needed to support analytics. Here are some common ones:

Sales Performance

- What are our top-selling products and regions?
- How are current sales performing against forecast or quota?
- Which sales reps or teams are exceeding or missing targets?
- Are we gaining or losing market share in key segments?
- What is the average deal size or order size over time?
- How effective are promotions or discounts at driving sales?
- Where are we experiencing the highest and lowest margins?

Customer Performance

- Which customers are the most profitable?
- How do customer returns and complaints impact performance?
- Are we meeting customer service level agreements (SLAs)?
- What's our customer retention rate by segment?
- How do on-time deliveries and fill rates vary by customer?
- Are there at-risk customers showing declining orders or engagement?
- What is the average time from order to delivery by customer?
- What's the customer lifetime value (CLV) across segments?
- How do buying patterns vary by customer type or industry?
- Are we upselling and cross-selling effectively?
- Which customers are expanding their relationship with us?

Purchasing Performance

- Are we getting the best cost and delivery terms from suppliers?
- Are there any supplier performance issues (delays, quality, etc.)?
- What's our purchase order cycle time?
- Are we over- / under-purchasing key raw materials?
- What impact are supplier issues having on production?

Production Performance

- Are we meeting our production schedules?
- What is our actual vs. planned production output?
- Where are bottlenecks occurring on the shop floor?
- What is the current OEE (Overall Equipment Effectiveness)?
- What are our scrap / rework rates by product line?
- Are we experiencing unplanned downtime / why?
- How does production cost vary by product or shift?

Distribution Performance

- Are we meeting our shipping deadlines?
- What are our logistics costs by region or carrier?
- What's our order fulfillment rate and delivery accuracy?
- How frequently are backorders or stockouts occurring?
- What is the average lead time from warehouse to customer?
- Where are we incurring the highest transportation costs?
- How efficient is our warehouse picking / packing?

Step 2 (Cont'd):

Define the Questions You Want to Answer

Inventory Performance

- Do we have the right inventory in the right locations at the right time?
- What items are overstocked or understocked?
- What's our current inventory turnover rate by product or category?
- Are we carrying any obsolete or slow-moving items?
- What are the trends in Days Inventory Outstanding (DIO)?
- What's the total value of inventory on hand vs. forecasted demand?
- How accurately are we forecasting inventory needs?
- Are stockouts affecting our ability to meet customer demand?
- How often are we expediting orders due to poor inventory planning?
- What's the impact of seasonality or promotions on inventory levels?
- Are inventory replenishment rules aligned with real consumption patterns?
- What's the carrying cost of our inventory?
- How much working capital is tied up in inventory?
- Which SKUs have the highest holding costs or shrinkage risk?
- What's the cost of inventory write-downs or disposals over time?
- What's our buffer stock level for critical items?
- Are there any single-source items that could cause disruptions?
- How well can our inventory absorb supply chain shocks or demand surges?
- Are we managing expiration dates or lot-controlled items effectively?

What to Do:

- Interview executives and department heads to surface strategic and operational questions.
- Map each question to a corresponding KPI or metric — and identify the source systems that feed it.

PRO TIP

Keep the scope focused. Start with 3-5 high-value questions that matter most to leadership. Proving the value of unified data with just a few insights will accelerate stakeholder buy-in.

Step 3:

Harmonize Your Data

Bringing data together from multiple systems only works if the data speaks the same language. This is where harmonization becomes essential.

What to Harmonize:

- **Customers:** Align naming conventions, IDs, and hierarchy (e.g., parent-child relationships).
- **Products:** Standardize SKUs, product families, categories, and descriptions.
- **Time:** Normalize calendar structures (fiscal vs. calendar year, weekly vs. monthly roll-ups).

Key Tasks:

- Create a **crosswalk table** that maps equivalent fields (e.g., "Customer ID" in ERP vs. "Account ID" in CRM, etc.).

- Establish **standard hierarchies** and **dimension structures** that allow for consistent roll-ups and filtering.

- Ensure the **consistency of aggregated data** like customer and product numbers. For instance, when analyzing sales by National Account, are all Sold-To customers correctly rolled up into the appropriate account? If a major customer has acquired a competitor you previously sold to, are those sales now included under the right umbrella? Consider what business rules need to be in place to make sure this type of consolidation is reflected accurately in your data.

Step 3 (cont'd):
Harmonize Your Data

Key Tasks (cont'd):

- Make sure there's **clarity around data definitions**. For example, does everyone on your team have a shared understanding of terms like "Net Sales"? Consistency is important, but so is clarity.

- Ensure the **accuracy of cross-referenced data** across sources. For example, when analyzing external data such as POS, are your partners' product numbers being properly mapped to your internal product or material numbers? Are there any rejected transactions that are being excluded from your reports? Making sure cross-references are complete and correct is essential to ensuring accurate calculations and insights.

PRO TIP

Don't skip this step — inconsistent data definitions are the #1 reason dashboards fail to gain trust. Harmonization is the glue that holds unified reporting together.

Step 4:

Use a Data Hub for Integration & Storage

Instead of relying on live connections or manual extracts, centralize and streamline your data with a modern data hub. This architectural approach ensures that data is cleansed, validated, and optimized before it ever reaches a dashboard or report.

What a Data Hub Enables:

- Pre-applied business logic (e.g., metric definitions, currency conversion, time offsets)
- Decoupling of operational systems from reporting workloads — improving performance and stability
- Historical snapshots and trend comparisons across time periods
- Integrated views across ERP, CRM, planning, and external data

- **Stratum in Action:** Silvon's Stratum hub consolidates and aligns data from multiple sources, applies business rules, and makes consistent, trusted data instantly available to users via pre-built views, dashboards, and reports.

PRO TIP

A centralized hub empowers IT to manage data quality and governance while enabling business users to explore and analyze confidently.ocus first on the systems that directly feed the KPIs you report on most often. Early wins build credibility for broader integration initiatives.

Step 5:

Deliver Role-Based Insights

Once your data is integrated and harmonized, the final step is to get the right information into the hands of the right users — tailored to their roles, responsibilities, and decision-making needs.

How to Tailor Reporting:

- **Sales teams:** Customer trends, sales pipeline, margin by region or rep
- **Finance teams:** Budget vs. actuals, cash flow forecasts, cost analysis
- **Operations:** Inventory turns, service levels, supplier performance
- **Executives:** Balanced scorecards, strategic KPIs, performance dashboards

Delivery Methods:

- Dynamic dashboards
- Web-based reports with drill-down capabilities
- Mobile access for real-time visibility on the go

PRO TIP

Role-based views drive adoption. When reports are relevant and personalized, users engage more often — and more meaningfully.

Conclusion

Unifying data from ERP, CRM, planning and other systems doesn't just solve IT challenges — it creates a powerful foundation for better business decisions. By following this 5-step playbook, your organization can break down silos, rebuild trust in reporting, and unlock smarter insights across every department.

Whether you're just starting out or scaling your analytics efforts, Silvon's Stratum platform offers the structure, automation, and business alignment needed for long-term success

Ready to unify your data?
[Request a Strategy Session](#) with a Silvon Solution Specialist

About Silvon

Silvon Software helps manufacturers and distributors transform raw data into strategic insight. Our Stratum platform connects and harmonizes data from ERP, CRM, planning and other sources to give business users a single, trusted source for performance monitoring supported by hundreds of pre-defined, easily customizable views and reporting templates.