



Case study: Charter Controls



CHARTERCONTROLS
SIMPLIFYING IT FOR YOU

Charter Controls

Charter Controls has been delivering high-quality control and automation solutions across the UK and Ireland for over 30 years, optimizing operations, boosting efficiency, and driving bottom-line results.

Their extensive product range includes industrial relays, switches, timing devices, motor drives, programmable controllers, and control panel accessories, set apart by innovation and reliability, with many products available exclusively through Charter Controls as an exclusive manufacturer's agent in the UK.

Customer service and satisfaction are central to Charter Controls' approach, supported by in-house technical expertise and tailored product recommendations across more than 5,000 SKUs available from their warehouse near Hastings on England's south coast.





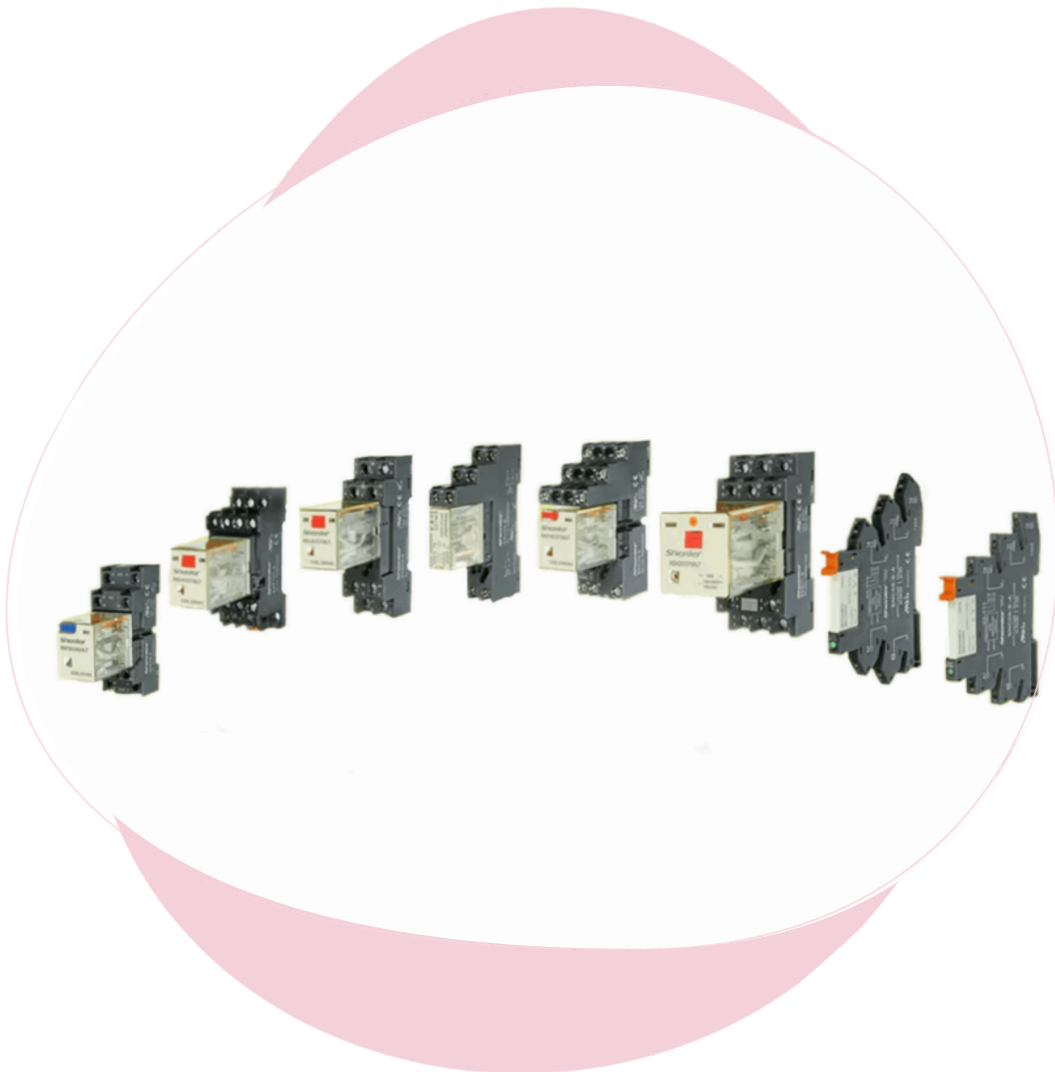
The challenge

Finance and Operations Director Ross Greenhill had built a detailed forecasting algorithm in Excel that supported Charter Controls well for many years. However, as the business expanded its product range, onboarded new suppliers, and continued to grow, the model became increasingly complex and time-consuming to maintain. Manual updates and ongoing maintenance of formulas were taking up an increasing share of Ross's time, limiting how effectively the data could be reviewed and refined.

While this forecasting approach was initially effective, system limitations reduced its ability to scale alongside growing demand. As a result, stock availability sometimes came under pressure, increasing the need for costly air freight from overseas suppliers to meet customer expectations.

With the business expanding rapidly, Ross recognized that Charter Controls had outgrown spreadsheet-based planning and needed a more scalable, automated solution to support the next phase of growth. He needed to ensure they could meet continually rising demand while:

- Minimizing reaction time to potential issues,
- Accelerating the order-building process,
- Understanding and improving efficiency,
- Understanding and improving stock health and service levels.





The solution

After exploring multiple inventory optimization solutions, Ross's assessment that EazyStock was the best fit for Charter Controls was backed up when it came out on top in price, service, and support.

As Charter Controls was moving from SAGE to Microsoft Business Central, EazyStock's ready-made AppSource connector was the icing on the cake. Ross knew connecting EazyStock to Business Central would enable him to automate manual processes, boost demand forecast accuracy, and take the pain out of inventory management.

Plus, since the team at EazyStock was easy to get along with, Ross knew a strong working relationship and a dedicated customer success manager would make their EazyStock journey - easy.

He wasn't wrong, as Marek Glaszewski, Charter Controls' dedicated customer success manager, explains.

"The Charter Controls implementation was one of the easiest connections I have ever done. Everything from connecting to Business Central, loading demand data, and extracting necessary data from SAGE was very smooth."

After implementation, Ross and Marek collaborated to establish the following objectives:

- Improve visibility of stock performance, lead times, and demand trends,
- Enhance forecast accuracy to optimize stock levels,
- Automate replenishment,
- Maximize service levels,
- Improve cash flow,
- Streamline the procurement logistics process.





The results

Building on a strong operational foundation, Charter Controls has achieved exceptional results that have met all its objectives.

*“Our purchasing process used to be scrolling through over 4,000 products to check for a red line showing an item’s gone below its minimum level. While the process was initially effective, it relied heavily on manual checks and often required last-minute, time-consuming adjustments to meet demand. That evolved into an Excel-based solution, and now **with Eazystock, we’re on top of it the entire way.** We know what we need to have and by when to fulfill customer demand.”*

As a result, a year after implementation, EazyStock has created the capacity to bring in a dedicated Purchasing Manager. With Lee in the position, Ross has freed up significant time for continuous improvement.

From

To

Difficulty meeting demand

95% service level



Reactive decision making



Proactive decision making

Time-intensive spreadsheet management

Streamlined automated process



Cashflow pressure from excess inventory



**Stronger cash position:
~200% improvement**

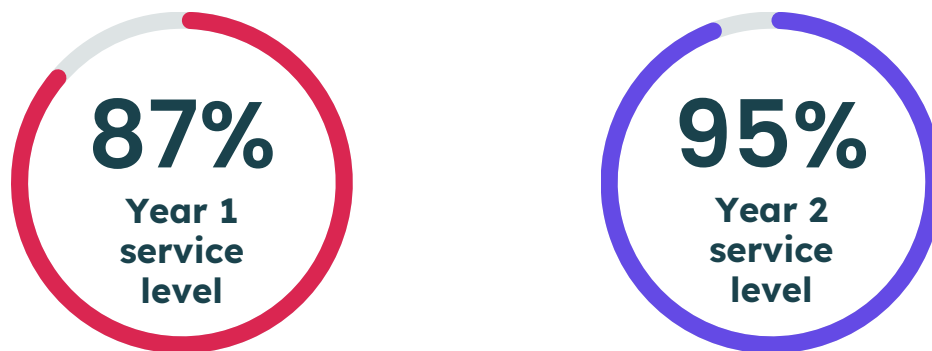
Limited foresight on order timing

Enhanced visibility to bring orders forward to scheduled cost-effective shipments



Enhanced visibility

Before EazyStock, service levels were reviewed using a combination of reports and customer feedback. EazyStock has since enabled real-time KPI tracking, providing clearer, more consistent visibility, supporting continuous improvement. Charter Controls can now track inventory management KPIs and have seen year-on-year improvements in service levels alongside a reduction in complaints.



With EazyStock's improved visibility, Ross has a detailed understanding of stock health and service levels. He can also add qualitative data, such as information about custom items, to the notes section, which flags when placing an order.

The improved data allows Ross and Purchasing Manager Lee to control their ordering. Instead of overstocking certain items to meet supplier MOQs, EazyStock tells them which items have upcoming demand, so they only order items that are certain to sell.

This is especially useful when managing multi-line orders and supplier minimum order quantities. If an incorrect quantity is entered, EazyStock highlights the issue early, helping avoid shortages, delays, or unnecessary spend.

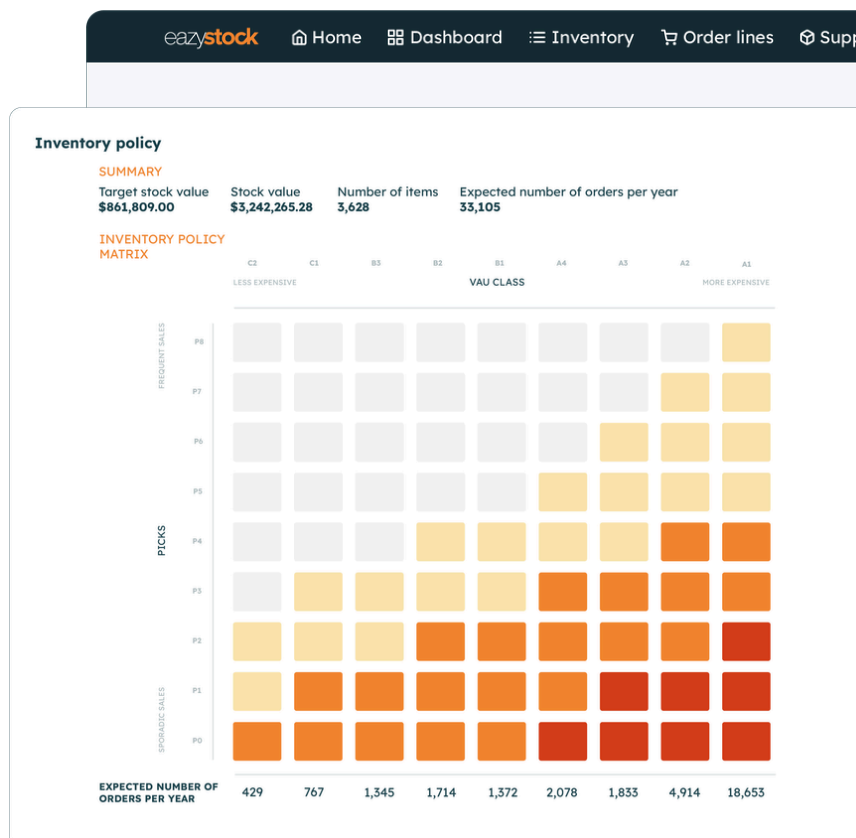
KPIs and reporting

Moving from Excel-based reporting to EazyStock has been transformative for Charter Controls. Using Eazystock data and reports, they can now extract and analyze data down to product, customer, and supplier levels to gain insights from different perspectives.

Establishing a monthly stock review has provided insights that a spreadsheet cannot, such as pick classes, as Lee explains.

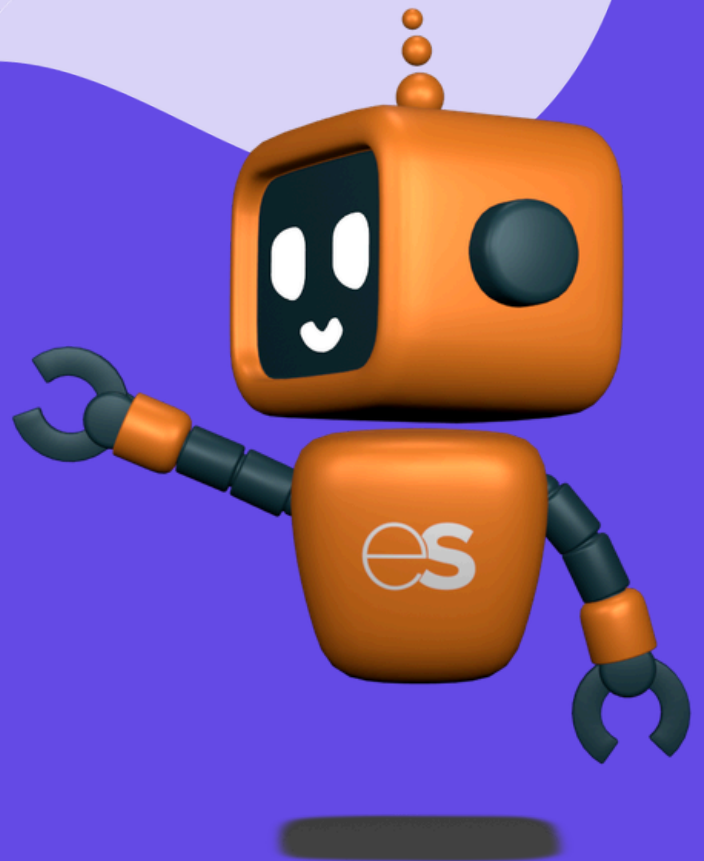
“Being able to drill down into pick classes and identify the exact class is transformative. I can see whether P8s need more attention or if we’re running out of fast-moving items, so I can address the issue promptly and minimize the financial impact.”

“We can understand why something might not have worked and see if it’s an anomaly or something we need to incorporate into forecasts.”



“Since implementing EazyStock, we’ve saved time and money and lifted our service levels. Our customers feel the difference, and going back to the old way of working would jeopardize that. If inventory is central to your operation, it’s the best improvement you can make. You won’t look back.”

Ross Greenhill
Finance and Operations Director



Streamlined inventory management processes and improved supplier communication

With EazyStock tracking lead times, Ross and Lee can update them based on actual supplier performance. This enables EazyStock to adjust forecasts and order dates automatically to maintain service levels.

The risk of run-out report has simplified the management of items with volatile or erratic demand from Far East suppliers. Previously, urgent demand often required additional air freight to ensure timely delivery. Now, a combination of accurate lead times and the risk of run-out report alerts Lee and Ross when they need to bring orders forward so they can include them in scheduled sea freight shipments, allowing them to cut transit costs significantly.

| ITEM CODE | ALERTS | WAREHOUSE | UNIT COST | DEFAULT SUPPLIER NAME | LEAD TIME | ORDER STATUS | STOCK BALANCE | TOTAL STOCK DUE | LARGEST SHORTFALL | LARGEST SHORTFALL VALUE | MAX. RUN-OUT TIME |
|-----------|-------------|-----------|-----------|-----------------------|-----------|--------------|---------------|-----------------|-------------------|-------------------------|-------------------|
| ABC_1234 | ROR LDO DTD | MAIN | \$0.01 | SUPPLIER 1 | 180 DAYS | PENDING | 67,890 | 0 | 907,482 | \$9,900.63 | 168 |
| DEF_1234 | ROR | MAIN | \$0.02 | SUPPLIER 2 | 135 DAYS | PENDING | 1.73M | 0 | 231,792 | \$1,478.60 | 16 |
| GHI_1234 | ROR | DEPOT | \$4.55 | SUPPLIER 1 | 85 DAYS | PENDING | 390 | 0 | 46,742 | \$420.68 | 1 |
| JKL_1234 | ROR | MAIN | \$0.11 | SUPPLIER 3 | 90 DAYS | NO ORDER | -13,450 | 1.29M | 17,007 | \$427.90 | 1 |
| MNO_1234 | ROR | DEPOT | \$0.32 | SUPPLIER 2 | 7 DAYS | PENDING | -8,840 | 10,080 | 16,474 | \$5,192.73 | 70 |

EazyStock also makes it easier for Lee to consolidate orders into a single shipment, reducing freight costs and minimizing the environmental impact.

Since moving away from the old spreadsheet, the team has streamlined its processes and shared the workload more effectively, giving Ross and Lee more time to focus on strategic priorities.

“Without automated alerts, issues were only identified through manual review, making it difficult to maintain full visibility and keep processes on track.”

The process is now simple to maintain. With more accurate data and forecasts, they can share them with their suppliers, making them better prepared to identify and address potential issues.

EazyStock has also taken the pain out of adding new suppliers in new territories.

“Customers won’t wait for their orders or for us to fix supplier set-ups. Now, we set them up in EazyStock, and Marek helps adjust buffer stock and order levels for the initial stages to gauge demand. That provides more confidence than if we were managing it with the Excel sheet.”



Improved cash flow

Since they began using EazyStock, Charter Controls has achieved its best cash flow position in the company's history.

*"We have been in the best **cash flow** position for the last two to three years, with average **increases of around 200%**.*

*"This **stronger cash position removes pressure** from day-to-day operations, and gives the business more flexibility to reinvest, respond to market changes, and operate with greater financial stability."*

Onboarding process

"Service and support were a key element in our decision to choose EazyStock, and they've more than lived up to our expectations," explains Ross.

"The connector helped make implementation straightforward, and Marek has been there throughout - always reachable by phone or email, and happy to jump on a call."

Lee has also been impressed by Marek's support. *"I joined Charter Controls once EazyStock was already up and running, but it wasn't a problem for Marek to provide more training."*

These results mean Charter Controls has successfully transitioned from spreadsheet-based planning to a scalable system that supports continued growth.

“We have been in the best cash flow position for the last two to three years, with average increases of around 200%.”

“Since implementing EazyStock, we’ve saved time and money and lifted our service levels. Our customers feel the difference, and going back to the old way of working would jeopardize that.”

Ross’s message to companies considering adopting inventory optimization software is: do it. *“If inventory is central to your operation, it’s the best improvement you can make. You won’t look back.”*

What’s next?

Ross and Lee are excited to collaborate with Marek to utilize more EazyStock features, such as creating additional reports, to enhance service levels further. With EazyStock’s support, the future looks bright.

“EazyStock has given us the ability to grow without our inventory becoming a risk. We can scale up and stay in control.”



eazy**stock**

Find out more

**To find out how EazyStock can help your
business, get in touch.**

Book a demo