

Jedox and the budgeting process

The challenge: Innovating the budgeting process in a complex sector like Transport



Customer

Fercam

Region

Italy

Industry

Logistic and Transportation

Department

Controlling

Solution

Sales Budget

System environment

Oracle DWH, QlikView,
Dashboards Business Objects

Executive Summary

Fercam found in Jedox an ideal solution to improve the budgeting & forecasting process. It helped saving time and became the perfect tool to control and evaluate the targets of the salesforce.

FERCAM – A trusted logistics and transport provider

In 70 years of company history, starting out as a small local logistics company, FERCAM has become one of Europe's leading integrated logistics providers: an evolution that started with full truck loads by road and rail, arriving at national and international road deliveries, followed by air and ocean freight. All these services are consolidated by the many large logistics centres, which today represent the hallmark of our offer.

FERCAM's strengths, such as operational excellence, cutting edge I.T. solutions, and collaborators with specialized expertise, translate directly into competitive advantage for the customers, who can concentrate their strategic priorities and resources on their core business, reducing time and risks.

Hi-Bi Partner solution – Jedox to renew budget & forecast processes

Hi-Bi, one of our Platinum Certified Partners, faced unique challenges with FERCAM's complex sales organization with numerous hierarchies. Additionally, the time frame FERCAM needed to work within was really short. Fercam confirmed the project for Logistics Distribution Italy & International Divisions and decided to immediately replace the existing processes.

Jedox for Sales Budget – go live in one month

Led by our Partner Hi-Bi, figures were extracted from Qlik Dashboard and Oracle Datawarehouse, two business intelligence tools they already had in place. The Jedox solution was used to integrate source data from and to the data warehouse. The web-based Jedox front-end was chosen to develop data entry modules and report process status monitoring. After one month from the project's start date, they went live and business users were able to insert first data in the database.

Number of users:

- ▶ 5 controlling managers
- ▶ 10 area managers
- ▶ 120 sales agents (development plan)

Benefits:

- ▶ Eliminates version control problems
- ▶ Simple and user-friendly web interface
- ▶ Adoption speed
- ▶ Target scenarios and simulations
- ▶ Monthly forecast & budget update after period closing

Why Jedox & Partner

- ▶ Solid architecture and easy installation
- ▶ Automatic top-down splashing of budget & forecast
- ▶ Partner experience in logistic & transportation and fast Datawarehouse integration
- ▶ Best features for managing and monitoring the workflow.

“With Jedox doing the budget is not a mere data collection. It is a workflow that follows the pace and changes in the distribution network and the salesforce.

This allows us to build simulations, scenarios and data integration giving an edge to the whole budgeting process”

**Alessandra Martinez Direzione,
Generale Responsabile Ufficio
Controlling**

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Features examples – target definition – process monitoring – unique database

Target scenarios and managing of budget insertion

After going live, the central office decided to add some target scenario to let the sales agents and area managers verify their data insertion in comparison with global target at subsidiaries level. Though monitoring reports were only available to controllers they could see the progress of the budget & forecast process and manage opening and closing of each area manager's budget.

From Excel to Integrated Access to Jedox in-memory database

Budgeting processes became more stable since it was no longer necessary to collect dozens of Excel files and to work for weeks putting together and correcting data. The whole controlling team could see workflow progress in all process phases: insertion, analysis and adjustment.

Changing the approach and increasing automation

Through defining target scenarios, the way of building a budget changed. Bottom-up data entry was combined with Top-down assisted definition. Sales directors could then focus on key accounts and manage all other customers with an automatic split of data.

FERCAM is planning to extend Jedox use to their entire salesforce and to the remaining sales divisions. Moreover, they are adding also operative and economic budget to the Jedox database and reports.

HI-BI.IT**About Hi-Bi, Our Certified Platinum Partner**

Hi-Bi is a Business Intelligence consulting company founded in 2012 in Italy in Vigonza, Province of Padua. Our team of experienced consultants have worked in the BI Market for many years. Our BI implementation methodology has evolved during the last years on the wave of the new BI tools that pushed forward the BI market.

FERCAM found their ideal solution in Jedox for improving their budgeting & forecasting process. It helped save time and became the perfect tool to control and evaluate the targets of their salesforce.