

## Bystronic automates decentralized planning

Comprehensive CPM solution in combination with Jedox and Qlik



### Client

Bystronic

### Region

Worldwide

### Industry

Mechanical engineering

### Department

Controlling, Finance

### Solution

Financial controlling, planning, budgeting and forecasting

### System Environment

SAP, CRM-System, Microsoft Excel, IBM Cognos Analytics, QlikView, Jedox Simple.Planner-Suite®

### Executive Summary

Bystronic has supplemented its CPM reporting environment with the Simple.Planner-Suite® from Jedox partner Business & Decision, replacing the previous Excel-based planning and budgeting. The planning processes with all branches in more than 30 countries have been accelerated and simplified with a significantly higher level of detail. The finance department can now independently control the user-friendly application and create individual sales analyses and financial reports at any time as required.

## End-to-end financial processes

With more than 2.800 employees, Bystronic is a leading global provider of high-quality solutions for the sheet metal processing business. The focus lies on the automation of the complete material and data flow of the cutting and bending process chain. Bystronic's portfolio includes laser cutting systems, press brakes, and associated automation and software solutions. Since 1994 Bystronic has been a part of the Swiss industrial holding company Conzeta.

### Challenges: Decentralised budgeting process in more than 30 countries

The company headquarters are located in Niederönz (Switzerland). Additional development and production locations are located in Germany, in Italy, and in China. Bystronic is actively represented by its sales and service subsidiaries in more than 30 countries and has agents in numerous other countries.

Bystronic lacked a suitable system solution for the operational planning of this worldwide organization. In the area of as-is reporting and financial consolidation, the company was already well positioned with QlikView and IBM Cognos Analytics - but decentralized budgeting was still carried out with a time-consuming and error-prone Excel solution.

### The Solution: Worldwide planning solution ready for operation in six months

The responsible department Group Controlling therefore decided to supplement the existing CPM environment with the Simple.Planner-Suite® of the Jedox partner Business & Decision. The Jedox planning solution integrated in Qlik combines powerful planning functionality with intuitive analysis and visualization in a consistent, easy-to-use reporting platform.

The time frame for implementation and rollout was tight, but could be met thanks to the prefabricated structures of the Simple.Planner suite: After the start of the project in March, the solution was ready for operation in August 2018, and the worldwide planning process was carried out in the Jedox environment for the first time in October. The simple operation of the web solution contributed significantly to the smooth start in all locations.

## Users

- ▶ 50

## Benefits

- ▶ Worldwide planning environment implemented in six months
- ▶ Decentralized planning simplified and accelerated
- ▶ Increased transparency and identification of business drivers

## Why Jedox?

- ▶ Powerful planning functionality
- ▶ Seamless integration with Qlik, easy connection of further source and target systems
- ▶ User-friendly self-service environment
- ▶ Flexible and simple system adaptation
- ▶ High-performance ad-hoc analyses

*„With the introduction of the planning application, we made a big leap forward. Jedox is very user friendly. In doing so, we can design our own individual planning model and place operational planning in the hands of the world-wide distributed specialist users.“*

**Stefan Rusu,**  
**Senior Group Controller,**  
**Bystronic**

## Contact Jedox

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## Solution: Automated EPM platform

After the successful first planning round, the individual planning model was further refined. It was important to the Bystronic controllers that they could carry out this adaptation independently and, for example, simply optimize data models or reports themselves. System control is therefore now in the hands of the central finance department.

## Results

### Controlling flow from data source to plan consolidation

The integrated platform supports all phases of the reporting and planning processes with integrated data streams and a complete data view. A systematic data exchange takes place between Qlik and Jedox. The planning application also provides the financial consolidation in Cognos with regular export files. Current plan/actual comparisons are available at all times, both at the detailed controlling level and in the consolidated view of the financial statement preparation with balance sheet, P&L or cash flow.

### Driver-based planning and forecasting

The Jedox application covers budgeting and three forecasts per year. The central controlling sees the powerful analysis functionality of the software solution as a big advantage. Fast ad-hoc analyzes in high detail and the presentation of plan variants help much better than before to identify the drivers of the business. In addition to the classic planning values such as sales and costs, the service-oriented engineering company u.a. KPIs like capex, opex and warranty costs are important control sizes. The powerful planning engine enables the efficient coordination of all plan values and budgets up to system-supported IC coordination. Sophisticated functionality, such as commenting down to the cell level, supports the strategically oriented discussion within the company-wide financial community.

### Planning and Analysis for All

With the Jedox solution, Bystronic pursues the goal of providing planning and analysis for all stakeholders in the company. The solution is already being used in all branches, so far primarily by key users from the finance department. The simple report customization, e.g. with control variables from a local or group perspective, supports the targeted supply of information. In the future, the flexible and user-friendly solution can also be easily extended to other specialist areas such as sales or purchasing.

## Business & Decision AG ([www.businessdecision.ch](http://www.businessdecision.ch))

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