
The Basics

Industry

Logistics and Transportation

Revenues

\$1.1 billion

BPM Partners Services

- KPI Development
- Vendor Evaluation / Selection

This leader in international transportation leasing had outgrown their client server based planning solution which lacked the scalability and functionality to support growing planning and reporting needs, and required labor intensive support. Staff was spending more time on data collection and validation than on analysis to drive business performance. They engaged BPM Partners to help prioritize requirements, evaluate solutions, and assist in developing key performance indicators for strategic planning, budgeting, and performance reporting.

The Challenge

- Improve driver based budgeting and forecasting capabilities
- Improve KPI reporting and analysis capabilities and provide more timely, accurate, and reliable information
- Automate data integration and report production and distribution
- Reduce current labor intensive data collection, manipulation, and reporting process

Best Practice Approach

- Led comprehensive project scope and business requirements definition and prioritization workshops
 - Conducted structured review of KPIs and facilitated identification and development of additional KPIs tied to strategic plans and objectives
 - Leveraged comprehensive vendor evaluation process to identify and evaluate vendors to support selection of the most appropriate solution
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Benefits

- Enhanced ability to plan, measure, and monitor business growth through analysis of enterprise wide budgets, forecasts, and key performance indicators
- Improved planning capabilities through driver-based forecasting, and multiple scenario modeling
- Ensured data consistency, accuracy, and security by performing all budgeting and KPI reporting within a single BPM application
- Reduced time spent gathering, assembling, and validating data
- Enabled more timely business decisions based on increased access to accurate, meaningful information
- Improved workflow and process control, ensuring data integrity and reducing budget cycle time

"We found BPM Partners' established processes, procedures and guidelines very beneficial in bringing all the variables of our project together. In addition, as the project progressed we appreciated how they provided direction and feedback along the way, but then stood back and allowed us to make the final decisions. They were a great value for the money."

Business Analyst

Wanted: Improved Budgeting and KPI Reporting

This international leasing company is one of the world's largest specialty container lessors. By focusing on a technologically demanding market niche, the company's fleet has grown to more than 140,000 tons of containers and diesel generator sets available for operating and/or finance lease arrangements.

The company had outgrown a client server based budgeting system and was relying upon a fairly labor intensive process to produce essential management reports using a variety of systems including Oracle Essbase, Business Objects Crystal Reports, and Microsoft Office products. Company management determined that these processes and systems were not sufficiently scalable or flexible to support the increasing complexity and type of performance planning and reporting required as the company continued to grow and expand their global operations.

The client sought a reasonably-priced software package with sophisticated features and functionality to help streamline the planning, budgeting, and KPI reporting process and expand their analysis capabilities.

The Road to Success

The business engaged **BPM Partners** to facilitate a structured vendor evaluation and selection process intended to choose the most appropriate planning/budgeting software to meet their current and future business performance management requirements. **BPM Partners** conducted comprehensive business requirements sessions with the Finance and Information Technology teams, business unit managers, and key executives to define objectives for the project and assist the client's team in defining their requirements for a new planning, budgeting, and reporting system.

BPM Partners facilitated a comprehensive review of existing key performance indicators along with structured workshops with client executive and business unit management to identify an enterprise wide set of KPIs which were adopted to provide a consistent measurement of performance against the company's long term strategic plan and objectives.

This major leasing company was looking for a true BPM platform that would free them to focus their efforts on timely decision-making, analysis, and strategic planning, rather than on the mechanics of the budgeting and forecasting cycles.

BPM Partners coordinated a comprehensive evaluation of performance management vendors capable of meeting the company's defined requirements using a structured vendor evaluation process that included customized proof-of-concept product demonstrations.

Finally, BPM Partners assisted the company in completing detailed reviews of software licenses and implementation consulting service estimates, as well as extensive customer reference checks for the vendor and consulting company that the client ultimately selected.

The Solution

The resulting solution provided the company with a BPM platform that met their current needs for budgeting, forecasting, and KPI reporting, while giving them a solid foundation for future enhancements in consolidation and other areas. Key features of the selected solution included:

- User friendly, web-based front end, with a customizable dashboard view displaying key performance metrics
- Tight integration with Excel
- Scalability to support multiple users from more than 36 global locations
- Driver-based modeling, with multiple what-if scenarios, involving headcount/salary planning, operational statistics, and equipment planning
- Budget process workflow, with ability to view and report on departmental status
- Integration with legacy data sources (including Lawson General Ledger, an industry specific billing and equipment tracking system, and Hyperion Essbase)
- Ability to handle complex planning, reporting, and analysis
- Ability for non-technical resources to maintain centralized business rules, organization structures, and application dimensions.
- Audit trails and business rule transparency
- Minimal IT support requirements, with no custom programming

The finance team and business users at this company are now able to more effectively plan, forecast, report, analyze, and manage their business to achieve their strategic goals.



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