SIMPLEFI

SAP Analytics Cloud Case Study for Professional Services Firm: End to End Planning integrated with S/4, CRM, and SuccessFactors

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Company Overview

Professional Services Company

Our client is a professional services company helping Fortune 500 to small/medium size companies achieve a truly intelligent enterprise. They do this for Human Capital Management, Enterprise Asset Management, Consumer Industries, and Geospatial solutions with leading SAP technologies.

Project Goals and Overview

This company is undergoing a full finance transformation including updating their financial transactional system to S4HC, their CRM system to SAP C4 (Cloud for Customer), their HCM system to SAP SuccessFactors, and their planning system to SAP Analytics Cloud. The goal of the project was to integrate these various source systems with the planning and reporting system as well as to replace the current planning system (Workday – Adaptive Insights). Additional goals included increasing automation and reducing the effort needed to generate a forecast every cycle.

Partnering with SimpleFi allowed the company to take advantage of several pre-built packages which greatly reduced configuration time and allowed for early feedback in the project timeline and reduced costs.

Project Scope

The following was included in the business process scope of the end-to-end implementation:

- Integration with new SAP systems SuccessFactors, C4 (Cloud for Customer), S4Hana Cloud
- Sales and Pipeline Planning – Source data from S4 and C4, allow for adjustments and calculated accounts
- Capacity Planning – ability to plan utilization for billable employees
- HR Planning – Source data from Success Factors, input drivers (bonus/merit/proration)
- Financial Planning and Reporting (P&L, Balance Sheet, Cash Flow)
- Detailed Expense Planning (travel, contractors, capex, etc)
- Foreign currency translation of over 12 entities

Project Challenges

Integrating multiple systems with a global deployment that covered 6 different time zones proved challenging and required a good amount of flexibility in getting people together as a group to solve problems that occurred between various systems. Because this was a finance transformation, our SAC project often had to take pauses to allow for the transactional systems to complete specific configuration and testing to allow us to move forward. Significant advancements in SAC capabilities during the project timeline also made for some challenging design considerations.

Project Wins

Several wins were achieved as a result of the SAP Analytics Cloud Planning Project:

- 100% elimination of manual downloading/transforming/uploading process for getting data into planning system from transactional systems
- Individual security models which give the users flexibility to see and change the data they should be able to, without risks of seeing and changing data they shouldn't
- Easy to manage visualizations and workflow which wasn't available in previous planning and reporting system
- Integrated loading processes that load master data and transaction data with the click of a single button
- Automated report books

Customer Feedback

SAP Analytics Cloud gave us the power and flexibility to view and combine our data from our other SAP solutions like CRM and SuccessFactors and use this as the starting point for our forecasts. Eliminating most of the time used to collect and reconcile data that had to be previously downloaded and uploaded between systems.

- Director FP&A

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