

How a Restaurant Chain Transitioned FP&A to SAP Analytics Cloud for Planning

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SAPinsider



In This Session

Learn how a restaurant chain built a business case for a best in class SAC solution including **Sales and royalty**, **Cost Planning**, **Workforce Planning**, **Financial Statements Planning** and **Financial reporting** consolidating data from over **60 distinct non-SAP ERPs** managing 90+ restaurant brands.

Client Partner : Eric Blondin

SIMPLEFI

Background:

With over 25 years of experience working with BI and planning solutions, Eric leads SimpleFI's Platform and Technology competency. During his career, Eric managed teams of experts to help organizations define their BI/Planning strategy and roadmaps. Eric has provided expertise to SAP customers in multiple countries in North America and Europe, he was also involved in the academic sphere, teaching Business Intelligence to masters students at the Université de Sherbrooke (Canada) and SAP Education BW classes (France). With his great customer mindset and excellent communication and team-playing skills, Eric also lead the team that ended in the top 3 of the 2019 SAC Planning Hackathon, the 2022 Hack2build event and the 2023 Plan to Win Data Hackathon.

Expertise:

Industry

- Telecommunications
- Retail
- Wholesale
- Manufacturing
- Mining
- Banking

Areas of Expertise

- BW (Certified)
- BPC Embedded & BW Integrated Planning
- SAP Analytics Cloud (Certified)
- SAP Datasphere
- Business Objects
- IBCS Visualization standards
- Predictive Analytics
- User training



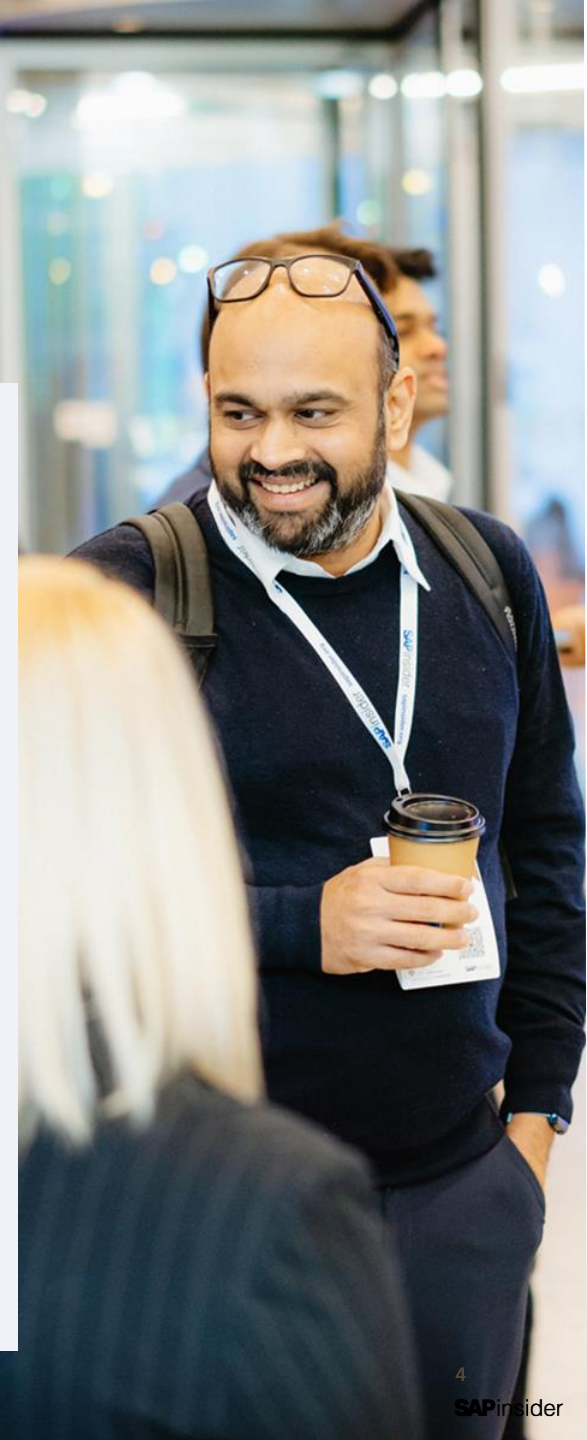
VP Platform & Technologies

Planning and Analytics

Architect and Program Manager

What We'll Cover

- Initial Business Case
- Key strategic goals, roadmap and scope developed
- Project team members and change management
- Building project excitement and adoption
- Lessons learned after first full budget cycle
- Wrap-up



Initial Business Case



Take control of Budget

End of 2022, as budget season concludes it becomes clear that Excel is no longer the solution

- Over the last 10 years went from a few local brands to 70+ international brands
- Almost every brand has their own ERP (thankfully mostly standardized)
- FP&A organization being created
- Too many Excel files and too many exceptions

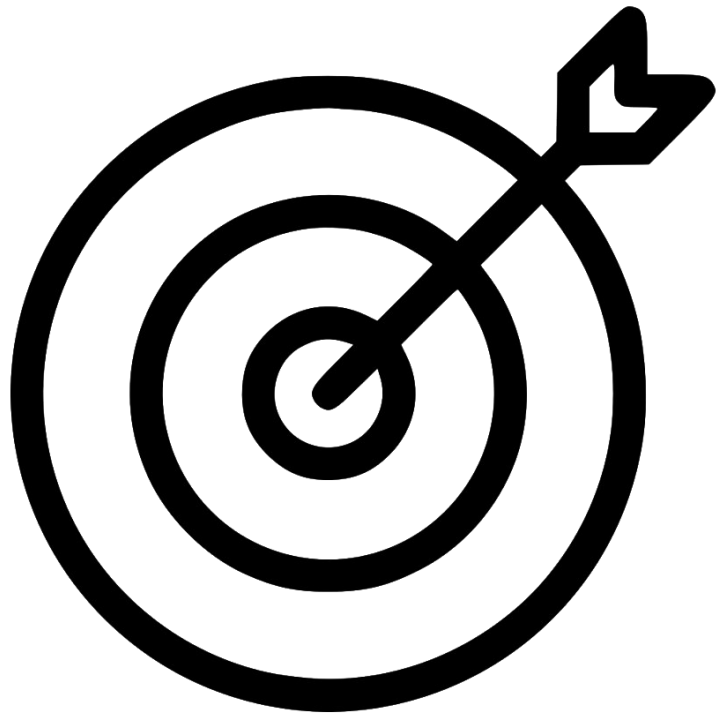
Market Research

What are the leading solutions on the market

- Must have integration flexibility, ERP transition budgeted for 2024 (not yet selected)
- Must have retail references
- Must handle currency translation
- Cloud-based
- Version management
- Cost-effective



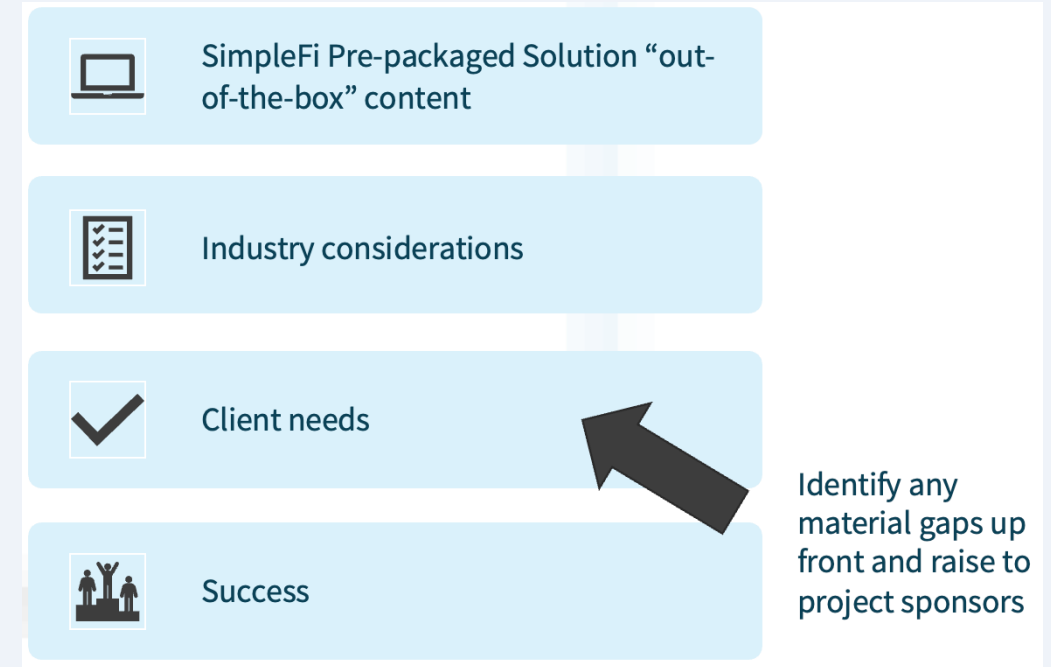
Key strategic goals, roadmap and scope developed



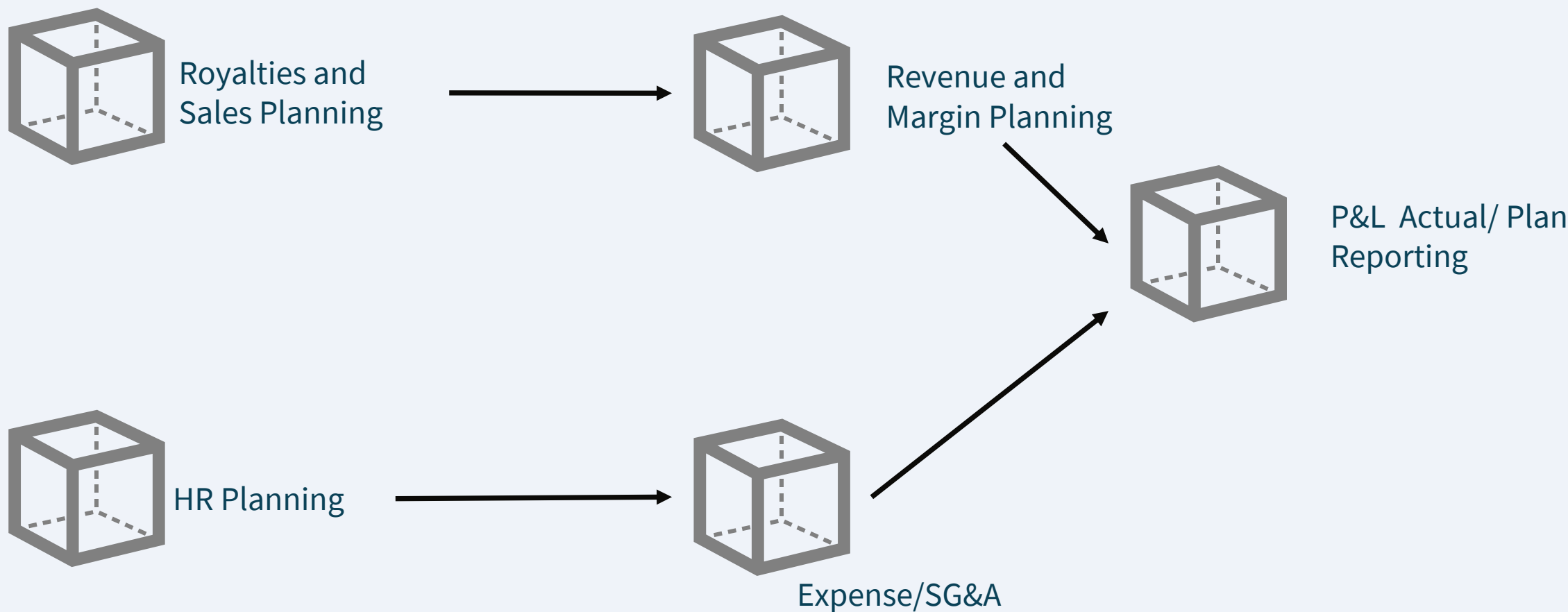
Key Strategic Goals

Build a solid FP&A capability

- Reduce time spent consolidating and reporting information
- Support company leadership in making the best decisions
- Reduce risk
- Analyze and communicate key financial insights

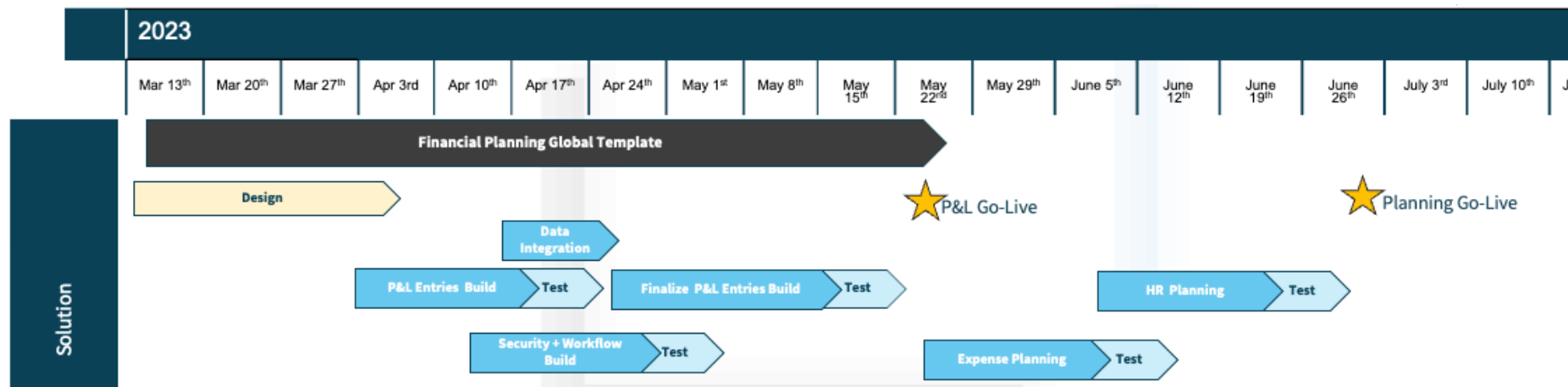


Roadmap

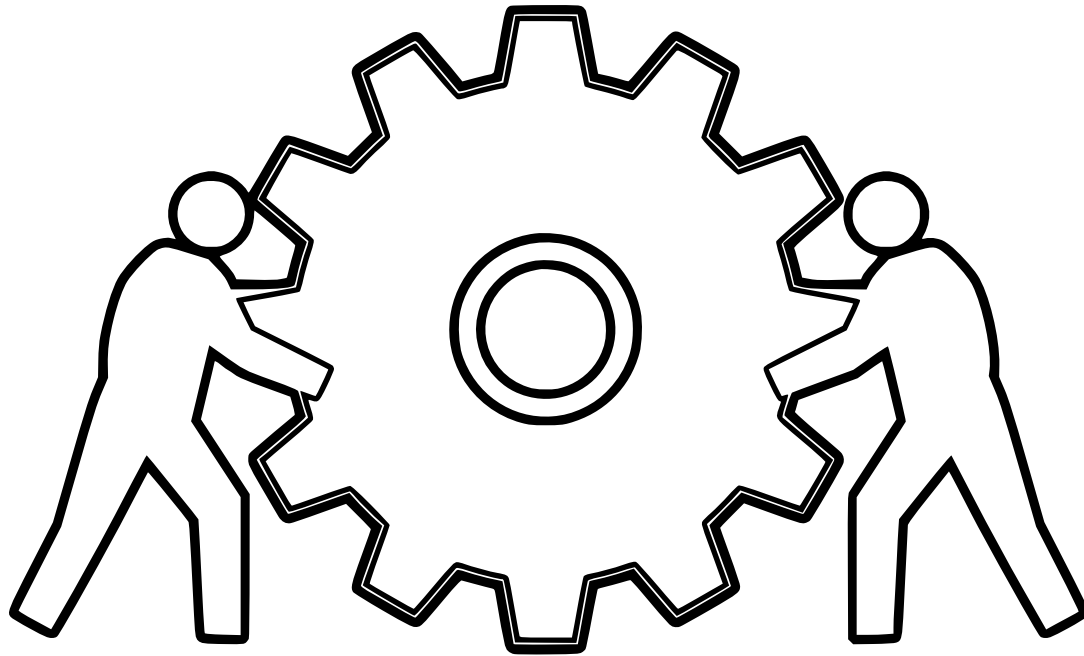


Scope Delivered

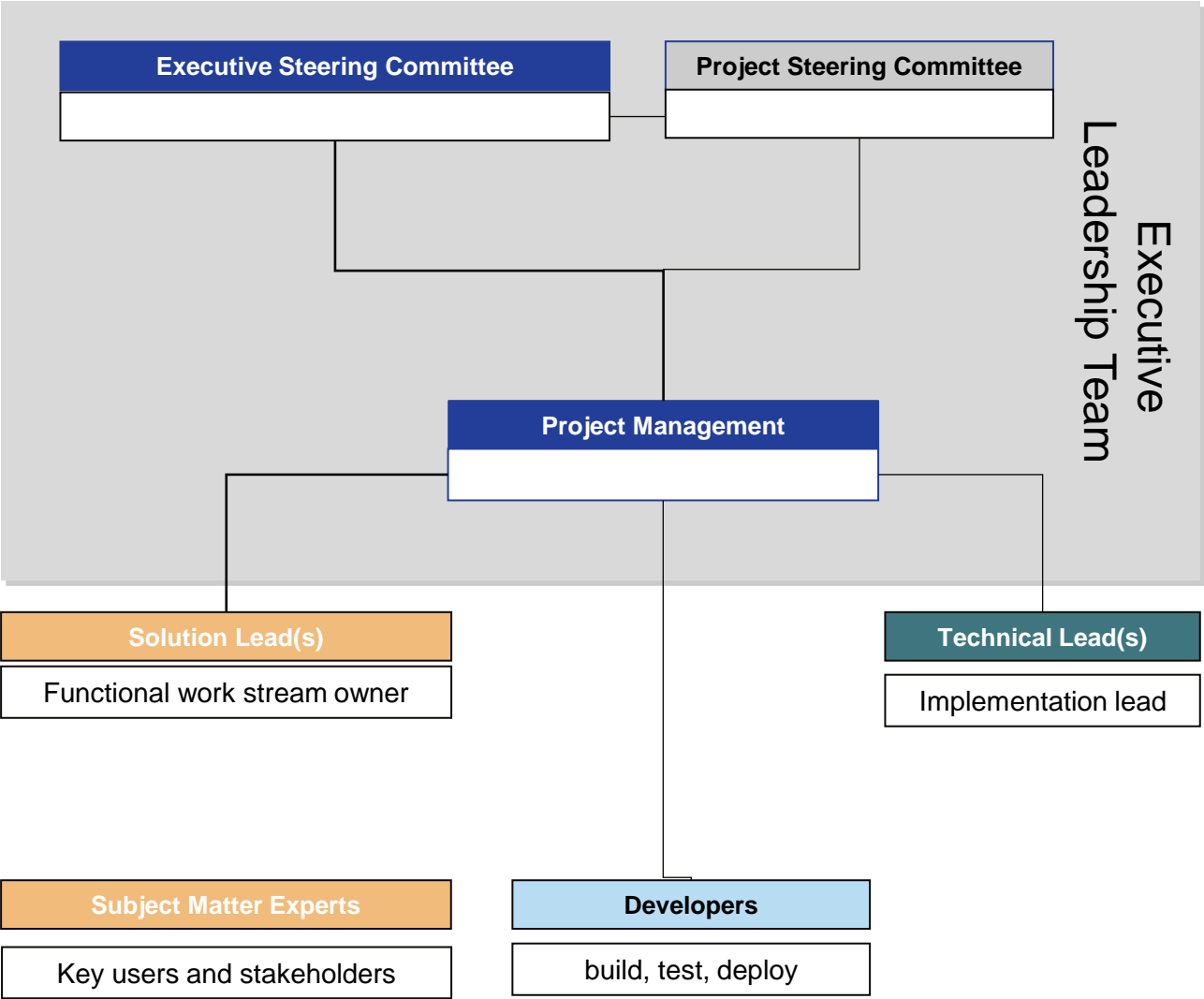
- From Sales to P&L planning process going through Royalties
- Expenses including Vendor planning
- Dynamic exchange rate calculations
- Mapping of 60+ charts of accounts (600 accounts each) into one corporate structure
- HR costs allocations to Brands and Locations
- Finance Report-book in replacement of PowerBi
- Brand-level security for over 200 planners



Project team members and change management



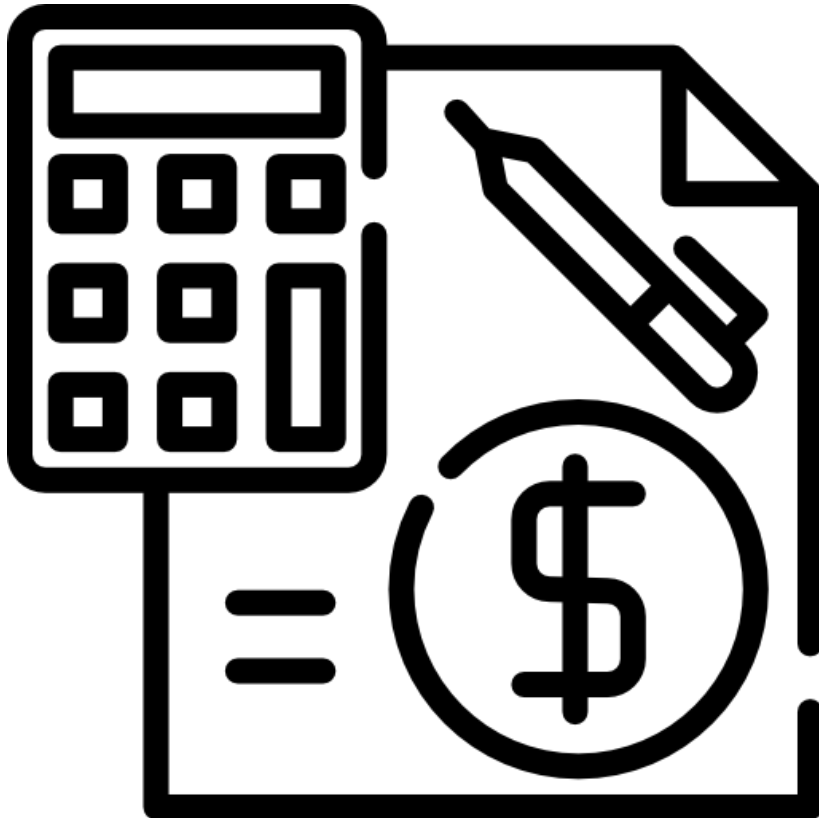
Team Structure



Change Management and Building Excitement

- Bi-weekly calls where the project team gets hands-on access to the solution starting on week 4
- Regular (monthly) communication to future user community
- Full demo on solution
- First budget cycle remained centralized to increase budget leads level of comfort
- All reporting through SAC

Lessons learned after first full budget cycle



Training is not everything

- Change Management is the most important element
 - Communicate to all users regularly during the project, not only the main stakeholders
 - Plan demos
- Planners need to understand the objective of all their inputs, this is hard to communicate on a first run
- Like any solution, clear process steps for all are extremely important

Sometimes the small things...

- Document all “complaints” by users and try to understand where time is wasted, sometimes minor changes can have major impacts
- On the other end, sometimes small tasks are too simple and result in poor data and can be greatly enhanced and optimized using analytical apps (javascript), although we are happy that we did not invest on these earlier on.
 - The actual requirements were not what was initially imagined
 - Analytical apps require more maintenance than standard stories, they should be carefully prioritized

Wrap Up

- Next major milestone will come when S4 rollout will be complete
- Evaluating running Financial Consolidations in SAC

Where to Find More Information

<https://simplefisolutions.com/retail-case-study-consolidated-reporting-and-planning-for-financial-statements-sales-and-royalties-with-sap-analytics-cloud-sac/>

- Case Study

<https://simplefisolutions.com/simplefi-solutions-llc-identified-as-leading-fpa-and-consolidations-vendor-in-sapinsiders-buyers-guide/>

- SimpleFi identified as leading FP&A and Consolidations Vendor

<https://simplefisolutions.com/sap-simplefi-chicago-planning-and-analytics-summit/>

- SAP & SimpleFi Chicago Planning and Analytics Summit

Key Points to Take Home

- SAC Planning addresses the process for any source system
- SAC is an option when thinking of Financial Consolidations
- Take ownership of your project
- Start simple
- Keep it simple

Thank you! Any Questions?

Eric Blondin

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