



Baking Up Operational Expense & Detailed Workforce Planning with Oracle PBCS



Founded in 1987, this company offers fresh baked goods, made-to-order sandwiches, soups, salads, pasta and custom coffees as well as other complementary products. They are committed to baking fresh bread from fresh dough in every bakery-cafe, every day. No artificial preservatives or short cuts, just bakers with simple ingredients and hot ovens. They are also focused on improving quality and convenience. With investments in technology and operations, they now offer new ways to enjoy their favorites — like mobile ordering and rapid pick-up for to-go orders — all designed to make things easier for their guests. Today, the company has 1,926 bakery-cafes in 46 states and in Ontario, Canada and approximately 50,000 employees and \$2.6B in revenues.

Challenge

With a focus on improving quality for their customers, this company realized they also needed to make improvements internally, specifically in the area of planning and forecasting. As with any fast growing company, their financial team suffered from an inability to manage the planning process optimally with their current technology investments. Financial planners were entering data through Excel uploads and Oracle® Financial Analyzer™ (OFA) forms. Cafes, Manufacturing and Consumer Product Goods had to complete their budgets with Excel, delivering spreadsheet files to their IT department for uploading. Reporting was produced through dumps out of OFA and managed in Excel, resulting in errors due to manual manipulation. Additionally, aggregations for the plan took an hour to complete and were run throughout the day during the planning process, which resulted in interruptions in the process of data submissions. All planning process applications were also maintained and supported by IT — overwhelming the IT organization and creating interruptions within the critical timeline of the financial planning process. The company also had little to no reporting available for management.

As an Oracle E-Business Suite™ (EBS) user for their General Ledger (GL), the company chose Oracle Planning and Budgeting Cloud Service™ (PBCS) and turned to Key Performance Ideas, an Oracle Specialized PBCS Partner, to implement the cloud based planning and budgeting solution to improve operational expense planning and develop detailed workforce planning.

Solution

This company has succeeded in bringing a state of the art solution to their business users by providing speed, insight and accuracy that they never had before. Oracle PBCS and Key Performance Ideas' quick implementation approach drove a successful development and a better forecasting process.

With Key Performance Ideas as their implementation partner, Oracle PBCS was implemented on-time and on-budget. The quick implementation has already provided the company positive return-on-investment and, not only does the executive team have the necessary reporting for key business decision making, the company has eliminated users' planning in manual spreadsheets. Additionally, the IT team has eliminated their burden of managing outdated applications and can now engage with the Finance team to support strategic initiatives needed for the growing company.

Their PBCS solution, built by Key Performance Ideas, allows financial planners to update workforce and P&L information directly within the application, through a familiar environment and process. The system was built to accommodate the company's growth plans: geographically and for future multi-currency needs. All reporting and data templates are now owned and operated by the finance team and Workforce Planning is now directly integrated and linked to the P&L and GL. Today, aggregations during the plan run in minutes, not hours!

Benefits Achieved

With Oracle PBCS and Key Performance Ideas, the company has achieved several benefits. Today, financial planners are leveraging intuitive, role-based web and MS Office interfaces for all of their planning needs, specifically operational expense and detailed workforce planning. The organization has reports available at the click of a button, and their IT department is less overloaded managing timeworn applications. With a cloud-based solution, this company has a new application without capital investment, limited maintenance and administration requirements, and no need to increase resources or personnel.

The company has calculated the following before and after results of the new solution:

Task	Before	After
Financial Reporting	Hours	Seconds
Budget Calculations	Hours	Seconds
Budget Aggregations	Hour, several times a day	Minutes
Budget Application	Unsupported	Supported & Enhanced



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