Innovation through Improvements in Planning and Forecasting with Hyperion Planning

This company is leading the charge to architecting the new network. They offer products and technologies that run the world's largest and most demanding networks today, enabling their customers to create value and accelerate business success within the new, rapidly changing global marketplace. Their customers include the top 130 global service providers, 96 of the Global Fortune 100, as well as hundreds of federal, state and local government agencies and higher education organizations throughout the world. As a pure play, high-performance networking company, this company is fostering a broad ecosystem of innovation across the network.

Challenge

Themes for Change:
- *Align processes with management vision*
- *Eliminate redundancies*
- *Focus on people and process*

As a world leader in innovation, this company's financial organization began an initiative in 2010 to align their processes with management vision, eliminate redundancies, and focus on their people and process. A long-term Oracle® Hyperion™ user, the financial organization had upgraded their system from Pillar™ to Hyperion Planning™ and wanted to take advantage of additional improvements from recent releases in both functionality and system performance. The company also turned to its long-term business partner, Key Performance Ideas, a leader in Oracle Hyperion software and related technologies. Key themes for the initiative included:

- Prioritize areas of improvement
- Pick higher value/lower controversy first
- Engage leadership to set tone and direction
- Upgrade Hyperion and provide material relief
- Define critical roles, expectations, and systems
- Engage Controllers and Financial Analysts in a continuous closed-loop manner

Solution

The company partnered with Key Performance Ideas and the team approached the initiative through three key areas: People, Process and Technology.

People: In order to clearly define the requirements for an upgraded Hyperion Planning solution, the company and Key Performance Ideas interviewed Controllers and Financial Analysts to provide both a strategic and tactical perspective. Candidates included global cross-business unit, corporate and regional users. They focused on key requirements across performance metrics, communications and process, organization, and technology. Key Performance Ideas helped the company prioritize over 20 opportunities identified as areas of improvement, including how best to manage change and deliver in-project quick wins to promote early user acceptance and implementation success.

Process: During the interview process, it became evident that a major objective of the initiative would be to fix current system performance delays created through processes that evolved organically versus strategically. The top four opportunities included:

- Reduce dimensions and level of forecast granularity
- Automate running of business rules
- Develop multi-currency data entry
- Identify long-term solution for supporting details toolbar

Technology: This company also found the performance of the planning solution to deteriorate over time due to growth. In fact, cube restructure took over 15 hours, forms were brutally slow, and loading external data, such as Human Resource (HR), was manually intensive. After engaging Key Performance Ideas and upgrading their planning environment, the company improved performance across several areas, including:

> "As time went on and the cube grew, the performance suffered when our cube reached over 80GB… we were not able to make changes on a timely basis."*v*—Finance Manager

Before	After
• Single BSO cube was over 80GB • Cube restructure took over 15 hours • Planning forms were brutally slow • Financial Analysts utilized third party Supporting Details upload tool vs. Data Entry via Planning Forms • HR data was painful to load and very manual • No Business Unit P&L's — done in Excel • No Capex loaded into Actuals • No LC data for Actuals loaded	• Used ASO and BSO cube architecture • Cube metadata changes completed in less than 15 minutes! • Form performance was in seconds vs. minutes — eliminated third party tool • HR cube created to translate data from mixed currency to single entity currency • New Business Unit P&L cube created • Capex and LC Actual data loaded to cube

Benefits Achieved

This company teamed with Key Performance Ideas on their initiative to innovate their planning and forecasting solution. After interviews with users and prioritizing results, the company upgraded their Hyperion Planning system and achieved the following benefits across their people, process and technology:

- Aligned their processes with strategic objectives
- Reduced forecast and close cycle time
- Implemented best practice processes and a platform to support continued growth and global expansion

Furthermore, with a well-architected system delivered by Key Performance Ideas, the company has improved system performance:

- Data Input Time by 600%
- Business Rules by 12,000%
- Toggling Time in Data Input Form by 3,000%
- Calculations by 3,000%
- Aggregating Actuals by 21,600%
- Outline Refresh by 60,000%

Key Performance Ideas