Moving from spreadsheet to cloud

CUSTOMER
Meat & Livestock Australia Limited

LOCATION
Australia

INDUSTRY
Consumer Industries & Retail

Challenge

- Significant reliance on Excel to transform, manipulate, calculate, consolidate and report data for financial planning and management reporting
- Difficulty in managing changes to planning and reporting hierarchies
- Complex and undocumented manual processes; problems with version control, accuracy and timeliness when reporting

Solution

- Implementation of Oracle® Planning using Accelerate Templates for Oracle
- Shift to a sequential planning process and data-based planning models that talk to each other
- Integration with SAP for data capture

Results

- Financial planning is faster, and there are fewer errors; reporting for each constituent is easier, with many reports automated
- Employees spend less time on data manipulation and more time on higher-value functions
- With data-driven information, stakeholders can be confident that investments are being managed effectively

Moving from spreadsheet to cloud

When you have close to 50,000 paying members and funding from the government, trying to use spreadsheets for financial management and reporting is stressful and problematic — enough so, in fact, that it sent Meat & Livestock Australia Limited (MLA) to go looking for a modern cloud-based alternative.

"Now we've got the main strategic objectives that cascade down into more detailed initiatives, and we allocate our programs of work across those strategic objectives we report against. There's a lot more rigor to the planning process."

— Ben Blinman
Financial planning and analysis manager, Meat and Livestock Australia

Headquartered in Sydney, MLA is the marketing, research and development body for Australia's red meat and livestock industry. Established in 1998 following the merger of two industry statutory organisations — the Australian Meat & Livestock Corporation and the Meat Research Corporation — MLA is a not-for-profit organisation owned by more than 50,000 cattle, sheep and goat producers who pay a levy on livestock sales, with the federal government providing matching funds for research and development (R&D).

The group's charter is to grow demand for red meat and improve the profitability, sustainability and global competitiveness of Australia's meat producers. But the organisation was getting bogged down using spreadsheets for strategic planning and reporting back to the thousands of constituents to which MLA is accountable.

"The bulk of our budgeting and reporting tasks were done through a slew of Excel spreadsheets based on extracts from ERP data," says Ben Blinman, MLA financial planning and analysis manager.

"The spreadsheets were overly complicated, with lots of different issues with version control and accuracy and all those sorts of things. It was very manual, very rudimentary. During the peak planning cycles it was a nightmare."

Reporting was also tough because the organisation tracks hundreds of key performance indicators (KPIs), and it was all done manually in Word. "So any sort of summarising or consolidation or dashboarding of our KPI performance was incredibly manual," Blinman says.
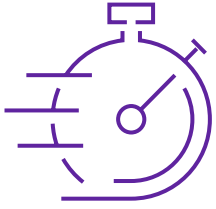
> "We no longer need to spend time manipulating data, which is a big point. We just hit a button now. We are also automating some of our reporting, and we are on the path to automate much more, so all that time we used to spend checking and setting up reports is now spent on more productive business activities."
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> — **Ben Blinman**
>   Financial planning
>   and analysis manager,
>   Meat and Livestock Australia

Given the high degree of data manipulation required to report for all those different stakeholders' requirements, accuracy issues increased our reliance on time consuming manual checking procedures, Blinman says. Scenario management was a real challenge. It was difficult to compare what was reported in different months because MLA's enterprise resource planning (ERP) system is set up based on allocations for various funding sources. "The way our system is currently set up, your actuals move around based on the percentage allocations with our projects. So, we weren't able to use ERP to reliably say what our actual was in that period."

Reaching for the cloud

MLA cast the net wide when it went looking for a viable alternative, eventually considering more than 12 solutions. "We had quite a complex scoring matrix, which spanned a lot of deliverables," Blinman says. Ultimately the organisation chose Oracle Planning implemented by DXC.

DXC Technology's Oracle team is the largest independent provider of Oracle consulting and managed services in Australia and New Zealand. With a full continuum of services around Oracle's integrated suite of applications, platform services, and engineered systems, DXC provides dynamic technology leadership in delivering Oracle Cloud solutions.

A key deciding factor for MLA, was DXC's Accelerator Templates for Oracle Planning. These templates provide a unique, industry specific, best-practice approach to planning and budgeting, and enable and harness every ounce of Oracle Planning's capabilities, he says. "It made it a lot more straightforward."

MLA took a go-slow approach to start, as the team using the tool learned the product and fine-tuned it. But now they are hooked. "What I have found with the cloud solution is it really gives power users the flexibility to take the product and run with it," Blinman says. "It really helps to empower the users."

MLA is using an integrated suite of Oracle data-based planning models that talk to each other and a sequential planning process that enables MLA to meet the organisation's rules about keeping funding sources separate and applying a certain cost-allocation methodology, Blinman says.

The models include:

- An income model that shows how much income MLA expects to receive

- A reserve model that enables MLA to calculate, based on that income, how much it will need to release from reserves

- A model to forecast overhead, which is basically the cost of running MLA

- A workforce-planning model

A different world

"Now we've got the main strategic objectives that cascade down into more detailed initiatives, and we allocate our programs of work across those strategic objectives we report against," Blinman says. "There's a lot more rigor to the planning process."

Keeping track of what was previously forecast and doing analysis to fine-tune forecasting — which was so difficult in Excel — is easy to do in Oracle Planning with scenario management, he says. "We can record the meat industry strategic plan, and all other scenarios, and report against them now. It means we can show external stakeholders we're managing their investments effectively. And that's been really useful, rather than saying, 'Oh, you know, we think this, or we think that.' Data-driven information is very powerful."

And all those KPIs? Now MLA can use Oracle Planning to generate the reports and track how the organisation is doing against the individual KPIs, including flags to show whether they are off-track. The tool can also roll them all up and show if "MLA is on track to deliver on its annual objective or its 5-year strategic objective," he says.

"We no longer need to spend time manipulating data, which is a big point. We just hit a button now," Blinman adds. "We are also automating some of our reporting, and we are on the path to automate much more, so all that time we used to spend checking and setting up reports is now spent on more productive business activities."

Oracle Planning has "delivered everything we wanted but also delivered value for money," Blinman says. "I don't need an IT resource to run the project. Some of the other technologies were expensive to run, and some of them required a dedicated IT resource."

When asked whether he was pleased with the solution, Blinman says he started off with a long wish list and a limited budget, and he believes the solution that has been delivered is very comprehensive and covers all the complex aspects requested. "Now that we've implemented everything and we've gone through and fine-tuned the solution, I have been very happy. And also very happy with the ongoing support."

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