



Business Intelligence Solutions Assistance Products & Services

A leading international provider of assistance products and services. Operating throughout Europe, North America and Asia.



This study is about a leading international provider of personal insurance, credit card services, and other miscellaneous assistance products and services. This customer has operations throughout Europe, North America and Asia, and has an outstanding reputation for anticipating and responding to customers' needs.

In order to maintain the level of service to it's customers, our client required better tools for planning and forecasting departmental figures. At that time, the Technology Finance department was struggling to keep up with reporting and forecasting demands, and unable to convert all available business data into meaningful information. The department's responsibilities required a system to create projections of enrollment counts, P&L dollars and GAAP dollars for the next three years across the organization.

The high volume of activity for this department demanded precision; but the current forecast and reporting process was manual and nearly impossible. Analysts had to sift through numerous reports, spreadsheets and databases, decide which numbers were accurate and often reenter data into new spreadsheets. Frequent late nights were required to meet deadlines.

Therefore, our customer decided to investigate options

for automating their process and reporting.

THE DECISION

The Customer needed flexibility, speed and a dynamic database to handle the many different areas of responsibility in forecasting and planning.

They needed an-easy-to-use system that could be rapidly deployed, without weeks of training and massive support.

While Hyperion met the technology requirements, it was not a product their staff was familiar with. After **Listening** to the issues at hand, HCG **Collaborated** with the customer to determine the best course of action. HCG was selected to architect and build the database model, assist in detailed system design, create the system to support this requirement, and build reporting enabling users to effectively forecast and report on the data.

Specifically, this department required a solution that met key business challenges. This new system must:

- Provide a simple method for entering forecasts of the current year
- Be able to load actual information from multiple operational bases
- Accommodate a large number of products, customers and marketing channels
- Support complex timing specifications that require

APPLICATION	Planning, forecasting and Actual reporting of enrollment counts, P&L dollars and GAAP dollars.
BUSINESS BENEFIT	Reduced burden on IT staff; Accurate reporting, streamlined processes, significant improvements and cost savings to forecast process; improved communication between finance and technology
SOFTWARE	Hyperion EIS, Hyperion Essbase, Microsoft Excel and Custom Reporting
HARDWARE	Windows NT Server

innovative architectural considerations.

- Support complex algorithms which mandate significant calculation processes
- With all of the above, the architecture must provide for fast data input response and reasonable database calculation and consolidation times.

THE HCG SOLUTION

HCG **Collaborated** with our customer to determine the business needs. The **Solution?** A system that manages all aspects of forecasting and management reporting.

This system allows managers and the finance team to access data from a single source—while keeping all information on one page. The system allows for collaborative forecasting and reporting with write-back capabilities, while still maintaining a simple, yet secure interface. It was also easy to distribute to all 150 users with little training.

- The Forecast Input allows controlled direct entry of forecast data to the Forecast Cube.
- Actual information is obtained from two different operational systems that are used to provide “midcourse corrections” to the forecast projections.

- The Forecast Cube is tuned for fast response of the calculations required by the Forecast Input facility. Thus keeping entry response fast.
- The Calculation Cube is tuned for the complex timing requirements and creates all projections of counts and dollars within this timing environment. Scripts are tuned to keep calculation times to a minimum.

THE RESULTS

With the help of HCG, our customer closed the loop on the forecasting process in time for them to meet the budgeting deadlines.

End-users were up and running without additional technology training, and the application is easily maintained by the finance team.

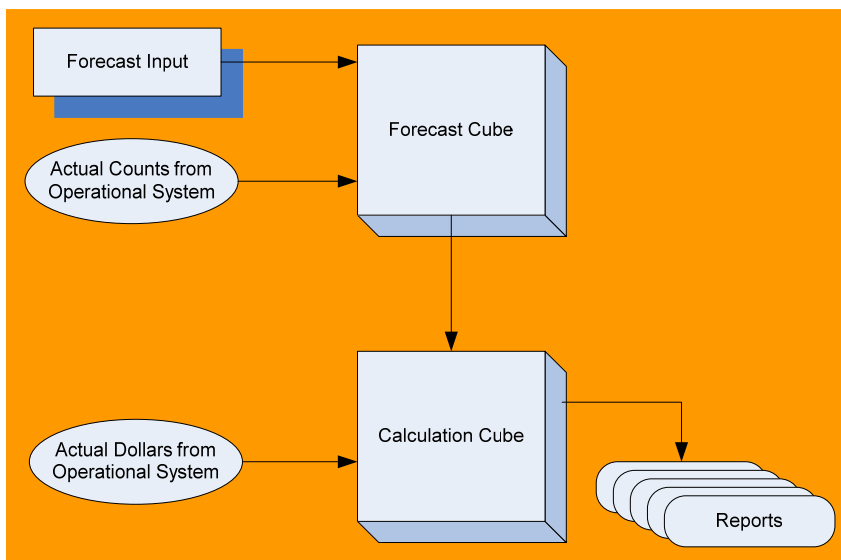
The custom application streamlined the forecast process requirements from several operational systems, data sources and support staff,

down to one system, one source for data and one support person.

The customer now has numbers that are clear, accurate and delivered on time. The precision and accuracy of the system has virtually eliminated costly mistakes in data misinterpretation.

The application has also opened up the communication between technology and finance. Users are able to pull up exact information about enrollments, or profits, and see how numbers compare with projections, and adjust accordingly.

Every level of the forecast process has been impacted. Analysts now have more time to produce analytical reports and build scenarios, and can give their organization a better handle on controlling costs and identifying issues



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