Holding Graz

prevero enables successful implementation of unique investment planning, using SAP data as a basis for detailed, clear planning and fast simulations

One of the main benefits of working with prevero: It offers a consistent data basis for everyone involved in business planning. At Holding Graz, prevero was able to replace isolated Excel solutions and ensure consistency for all departments in the company.

Holding Graz is one of the leading service providers in the federal state of Styria. During the last few years, the company has made intense efforts to set the course for a promising future with changed parameters.

The potential for success lies in the core businesses of Holding Graz: public transport (Graz Municipal Transport Services and Graz Airport), environmental services (water management and waste disposal), telecommunications, advertising, energy (with a 49% participation in Energie Graz GmbH & Co KG) as well as municipal services (funeral services, real estate and leisure activities).

The company’s guiding principle is to maintain and improve its performance standards as well as the quality of its customer relationships. Another important objective is to secure the future of Holding Graz as an interregional service provider by acquiring and developing additional business segments.

Holding Graz strives to enhance the quality of life in the region by providing mobility, environmental services, telecommunications, advertising, energy, leisure activities as well as funeral services.
The integration of Graz Airport perfectly complements the company’s transport business segment. Water management and waste disposal services are offered at an interregional level and the IT and telecommunications segment has also been extended to include areas outside the city of Graz. As far as funeral services are concerned, Holding Graz is the market leader in Styria. In the communication and advertising sector, the company’s strategic considerations are focused on further expanding into the south-eastern economic region.

Due to the expansion, the planning process had to be transferred to locally responsible persons. In this respect, it was essential not to hamper the operative work by changing the process itself or introducing a tool that required a lot of training.

The aim was to prepare data for the management in a flexible and standardized way while simultaneously ensuring a consistent process from the data basis to the highest aggregation level. Ideally, automated processes should provide the controlling department with more time for planning and analysis tasks.

Consistent results due to a consistent data basis. In the past, overall planning required a lot of effort and involved the reconciliation of numerous (up to 300) different Excel files. This only left very little time for actual analysis and controlling tasks.

Therefore, the objective was to integrate prevero with the source system SAP and to create a consistent data basis for central and decentralized reporting.

General requirements for the software:
- Multitasking capabilities
- Integrated P&L, financial and balance sheet planning
- Easy and accurate representation of internal service charges
- Transparency and ability to analyze across all hierarchies
- Easy handling of the new software due to a higher recognition value compared to previous systems
- Faster identification of significant information (time savings in the planning and forecasting process)
- Flexible, easy handling of changes in the company structure (organizational changes)
- Possibility to extend the solution to other units within and outside the company
- Scenario calculations

Standardized, time-saving forecasting tool for multiple users
Thanks to its perfect interaction with SAP BW, prevero supports two essential processes: consistent master data management and a flexible integration of up to 100 users into the planning and reporting process.

In addition, the following detailed requirements were fulfilled, exceeding the original expectations:
- One leading system; flexible representation of group structures up to detailed cost center structures
- Top-down and bottom-up planning at all levels
- Investment planning including a large number of special operational calculations
- Internal service charges at all levels (“market place” approach)
- Multi-level allocation system
- Document analysis for actual data
- 40-page company report in prevero

One leading system
An automated connection to SAP enables the system to automatically react to structure changes. Due to the organization’s dynamic development, the planning system not only incorporates changes in companies and new cost centers, but also additions to the corporate portfolio. Master data is exclusively maintained in SAP and is automatically transferred to the other systems.
Top-down and bottom-up planning

By integrating decentralized data providers, the planning and forecasting process at Holding Graz was shortened considerably while simultaneously increasing process transparency. As users have access to a central data pool, reconciliation cycles were reduced significantly and a harmonious alternation between top-down objectives and bottom-up details was achieved.

Investment Planning

At Holding Graz, investment planning constitutes a large part of the overall planning. Due to a high number of cost centers and users involved, the process is rather difficult to coordinate. The previously used Excel files, which had to be reconciled regularly, were replaced by a system with its own data pool that can be accessed by all people involved in the planning process. Central data collection now includes an approval process, which not only supports the recording of individual investments, but also ensures more effective controlling and monitoring of investments to be made throughout the year.

- Investment planning at cost-center level including automated depreciation calculation
- Planning many individual investments
- Taking half-year depreciation into account
- Taking long-term investments into account (i.e. investments that cause payments for several years, but are only capitalized in the fixed assets at a certain point)
- Construction development projects in progress
- Investment evaluations for each business segment structured according to profit centers or classifications

prevero is our central medium for business planning and reporting. The software is flexible, easy to handle and provides us with 100% data reliability. Thanks to prevero, we have been able to considerably enhance our performance and our activities have changed fundamentally. Due to the great time savings provided by the software, we are now able to perfectly support the management in their work.”

Mag. Dieter Rudorfer
Head of Group Controlling & Investment Management, Holding Graz – Municipal Utilities Company
Multi-level allocation system
A complex multi-level allocation system was implemented at Holding Graz. The preparatory and preliminary work in the previous tool were crucial for the success of the implementation. Now the allocation system works at the push of a button and is able to deliver the desired results within a very short period of time after each data change.

Document analysis for actual data
An important requirement for Holding Graz was to keep reconciliation tasks via telephone or email to a minimum during the analysis of actual data. prevero’s target/actual comparisons enable users to display a detailed analysis of actual figures at the push of a button without having to switch to another system or involving a colleague from central controlling. This approach saves time and increases the users’ understanding of planning and costs.

Internal cost allocation
Due to the complex cost center structure at Holding Graz, a transparent representation of internal cost allocation is essential. prevero’s central data pool provides an easy and transparent way to manage services and return services according to a “market place” approach.

Benefits
- Target value search and simulations including internal service charges
- 40% reduction of resources needed in cost center planning
- Consistent results through consolidation
- Traceability and transparency for all figures
- Confidence in the forecasts in all involved departments
- Successful implementation of unique investment planning
- Increased controlling performance
- Improved analysis and process quality
- Multitasking capabilities and high performance
- Carrying out simulations during the forecast creation phase

About prevero
prevero, a Unit4 company, provides Corporate Performance Management (CPM) and Business Intelligence (BI) solutions for planning, budgeting, forecasting, data analysis, dashboarding and reporting – supporting companies of all sizes in making smart decisions across every part of the business. Headquartered in Munich with additional offices in Europe, Asia and the USA, prevero employs 150 people and maintains an international partner network. The company helps more than 4,000 international clients including ABB, Audi, BMW, Endemol, Fresenius Medical Care, Konica-Minolta, Mercedes, Swiss Life and Swisscom.

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