espresso tutorials

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SAP® Enterprise Performance Management (EPM) Add-In

- Learn about the Connection Concept
- Get Familiar with the SAP EPM Add-In for Excel and BPC 10.1
- Create a Basic Report from Scratch
- Walk through a Detailed Case Study

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2. Case Study

To facilitate your understanding we will be working with a powerful learning tool: a sample business case. This chapter explains the details of the company and how they want to use the EPM Add-in. This case study will be referenced throughout the book to illustrate real business needs and how to meet them utilizing the EPM Add-in.

2.1 Case study overview

It is January 3, 2017. Rosie's Lemonade Company has been in business for almost six years now and is headquartered in Chicago, IL. The company has a strong presence in North America (Canada, United States, and Mexico) with over 500 distribution routes and several clients that range from local lemonade stands to big retail shops.

Figure 2.1: Rosie's Lemonade Company

Rosie's Lemonade Company has a wide portfolio of products that target several market segments, which has

grown rapidly over the years due to its excellent management and the successful operations of its business.

In the most recent board meeting, Rosie and other executives discussed the importance of keeping their financial planning processes in a centrally managed information system. They are now operating in three different countries and the ability to access critical financial information is a must.

As the CFO, Rosie knows that most of their planning processes are being done in Excel and it's hard to keep track of the different versions of their planning documents and keep everyone updated with the right information, especially when they need to make critical decisions.

Some of her analysts struggle to fulfill Rosie's expectations when preparing the financial reports for Rosie's meetings with the Executive Committee, mostly because each one has different templates and everyone owns a unique version of truth.

In a recent survey, some key managers at the company expressed their interest in using a tool to generate their monthly forecasts, enable them to make comparisons against actuals, load their transactional data from their SAP Business Warehouse, and improve their financial forecasting process by making it more dynamic. One big constraint to adopting the tool is management's fear that their analysts will struggle to learn how to make the same types of analysis they are currently performing in the new tool. In addition, they fear that the tool will not be adopted because there's a strong resistance to change within the organization.

2.2 Case study details

Rosie's Lemonade Company has been using SAP ERP (ECC) to keep track of their business transactions and most of the analytics are run using SAP NetWeaver BW for decision-making. However, their analysts are constantly complaining that they spend a lot of time exporting the data from BW into Excel to perform their calculations (allocations, distributions, etc.) and to build or manage their budget and forecast.

Management recognizes that a streamlined planning process will help the company overcome their growth challenges.

Since the company already works with Excel spreadsheets, management decided to leverage that familiarity with Excel to avoid low adoption rates.

After a core meeting, Rosie's Lemonade Company made the strategic decision to implement SAP Business Planning and Consolidations 10.1 version for NetWeaver and leverage the EPM Add-in (an Excel Add-in) as a unified tool for entering budgets, monitoring the forecasting process, and to keep track of different versions instead of having to deal with several files on user desktops.

One of the desirable features that the board is very happy with is the ability to leverage their existing BW platform. By leveraging the existing SAP BW they can tap into the important investments they have been making over the years to build a solid solution.

The key factors that led Rosie's Lemonade Company to use the EPM Add-in as their unified tool for their financial processes were the following:

- The tool will reduce their planning cycles and enable multiple iterations of analysis without having to deal with several versions of the same files.
- A reduction in change management costs, as resistance to change will be less since their analysts are already working with Excel.
- The tool is easy to adopt and learn since it's based on Excel, a tool the business is already working with.
- The tool will leverage the existing investment made in SAP BW to pull in sales and costs in order to build executive dashboards through the EPM Add-in saving costs and capitalizing on the money and effort already invested.
- Flexibility to unify different data sources into one common report.
- Security features enabling multiple groups to work simultaneously with their individual sets of sensitive data like headcounts, capital expenditure projects, and sales projections without permitting cross group access to the data.

At this point there should be a sound understanding of Rosie's Lemonade Company's requirements and why there is a strong desire to develop a streamlined financial process by leveraging the EPM Add-in's powerful features.

2.3 Summary

In this chapter, we explored a business case scenario that will be used throughout the book to explain key concepts that users should know when working with the EPM Add-in. Understanding these key concepts will facilitate the

learning process and guide the reader through each chapter following one thread connecting each key concept to the next.

Rosie's Lemonade Company's business case leverages several years of industry knowledge used to put together a case that is accurate and close to reality. It depicts real life scenarios and accurate client requirements that occur during a project implementation.

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