

Planning makes an information nightmare run like a dream

Unwieldy and inaccurate data was this firm's problem, writes **Dorothy Kennedy**

FLEET finance specialist Orix Australia, which has 500 local employees and assets worth \$2 billion under its management, used to struggle through budget time with a reporting mechanism that relied on hundreds of separate Microsoft Access databases and Excel spreadsheets.

Data quality was becoming difficult to ensure and management wanted a more efficient, intelligent view of the business.

Michael Gannon, the company's general manager of asset finance, credit and business systems, needed to find a system that would deliver a single view of the truth across the organisation.

"I really saw a lot of business units using different ways of reporting that ranged from Excel

to Access databases, and regretably, the degree of accuracy was brought into question on more than one occasion," he says.

Resources manager Raymond Beddie says the fleet services division has 30,000 contracts, three separate funding types and 12 products, each of which can have up to 50 lease elements, and it generates two to three million financial transactions a month.

Apart from this, Orix runs an asset-finance division and a truck and trailer business.

"The big issue was actually accessing information and then, based on the sheer volume of information, being able to put some intelligence across the top to give you an insight into what's actually occurring in your busi-



Smart move: Raymond Beddie is pleased with the investment

ness," Beddie says. To improve the data integrity of the company's forecast models and reduce the time taken to produce an executive view of those forecasts, a Cognos enterprise planning system was introduced and a

business intelligence program was undertaken. Gannon says it delivers the sort of information that lets fleet-sales staff focus on customers increasing their business, new customers and lost customers, and not waste time on

THE PROBLEM

Lack of accuracy of company forecast models in a financial services organisation processing 2-3 million transactions a month.

THE PROCESS

A phased implementation of CRM, enterprise planning and business intelligence systems.

THE RESULT

More accurate data produced faster, allowing more time for management to analyse results.

the other 90 per cent of customers classified as "static".

The project began in September, sparked by a customer relationship management system installed 18 months ago.

Cognos has now gone live in

Orix's fleet division and will be introduced to remaining divisions in the next 12 to 18 months.

It combines up to 600 spreadsheets and databases compiled over three to four years.

"Head office in Japan has a tight budgeting time frame that sees the close of the half-year in September," Gannon says.

"We were very low on the learning curve, and trying to implement during the budget cycle, introducing change."

Staff had to be pushed through the process, encouraged not to default to the 600 spreadsheets and databases.

"We were initiating change through a fairly stressful stage of the business," he says.

The cost of the project has not been insignificant — about \$400,000 before the integration program is taken into account.

The latter task was more ex-

pensive, Gannon says. "Some of our asset finance applications would cost around \$100,000 to \$150,000 a year on licence and support," he says. "This is a significant investment for us."

Gannon and Beddie believe it is critical to have the right people in the right roles.

"When you start talking about business intelligence you really need some people that understand the business exceptionally well and know how that data hangs together," Beddie says.

The project is not yet over, and Beddie believes it is too early to talk about return on investment, but he is happy with the additional data analysis capabilities.

"My personal feeling is that any of these tools don't save time, but the time you would normally spend on the physical mechanics of producing the past will be chewed up in looking at actual results of the data," he says.