

Litmus Group



QlikView passes the BI Litmus Test with Flying Colours

Established in 1998, Litmus Group is an employee-owned management consultancy firm. It helps clients to create tangible value by realising their strategies. Litmus achieves this by providing advice, expertise and practical assistance to solve a range of modern day business challenges including IT, business process, procurement and change management needs. The company employs approximately 80 staff and operates three offices along the east coast of Australia and one in Singapore..

Problem

Over the past few years Litmus has experienced substantial expansion, growing on average by 30% each year. As the number and scope of client projects grew, it became apparent that the company was rapidly outgrowing its spreadsheet-based reporting system.

Claire Taylor, Project Manager, QlikView implementation at Litmus explains, "Historically a lot of our management reporting was in Microsoft Excel and it was quite labour intensive to update. As an employee-owned organisation we have a strong culture based on transparency and self-sufficiency in reporting. All our results are available to all employees with everything being published on Microsoft SharePoint. As a result of business growth Excel was becoming monotonous to update and it was no longer a good investment of the Finance team's time."

The company decided it was time to introduce a business intelligence [BI] system, one that could provide fast access to critical information drawn from Litmus' key corporate systems: a time and expense application, ChangePoint; the Microsoft Dynamics GP financial software suite; Salesforce CRM [customer relationship management]; and a human resources [HR] application, HR3.

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At a glance

Business Objective

A business intelligence [BI] solution that could draw together metrics and critical data from the company's financial, HR, CRM, time sheet and expense systems.

Solution

- QlikView

Business Benefits

- Real-time visibility into company, branch and project performance through dashboard containing key business metrics
- Enhanced analytic ability, enabling faster identification of trends and exceptions
- Streamlined reporting time with almost instant distribution of reports
- Transparency of reporting to stakeholders

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What the company wanted was a software system that could draw out and publish key metrics on an easy-to-read dashboard. The reporting would need to include financial information such as profitability, return on investment, balance sheet and income trends. HR was also to be represented with people metrics such as utilisation rates, annual leave and staff retention statistics. At a project level, the company wanted to be able to identify project profitability, trends relating to industry sectors, geography and duration of engagements.

"The real key to the business intelligence [BI] project was that it had to satisfy the need for reporting self-sufficiency as well as being low to maintain," Taylor notes. Other requirements included the need for rapid implementation, a well presented dashboard that could be understood by a range of audiences, and the ability to cut and paste information from the dashboards into other documents.

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Solution

The company looked at a number of BI packages including QlikView, a BI data integration solution recommended by Professional Advantage. Built to consolidate data from multiple software sources, QlikView reports offered a fast, easy way to obtain information and conduct the analyses that Litmus management and staff were after.

"There were a few different key points that QlikView offered," Taylor says. "It was the right size to accommodate us now and for the next few years. We were aware of a few other significant platforms but we're just not ready for a 'sledgehammer to a walnut' type of approach. Therefore, the size, the cost, complexity and time to deploy were significant factors in our selection."

Another point in Professional Advantage's favour was that the two companies had worked together on Litmus' deployment of Microsoft Dynamics GP nearly 12 months earlier. Although it was still early days, Taylor says the organisations had developed a good relationship.

Most appealing to Litmus most was Professional Advantage's offer to conduct a "seeing is believing" demonstration. Using real data from Litmus' own systems, within the space of a day Professional Advantage built and demonstrated exactly the type of reporting that Litmus was after. "The exercise won us over. It was fast and it gave us a real feel for what could be achieved. We could see using QlikView we would have results coming out of the BI project by end of financial year," Taylor says.

Implementation

Implementation began in February 2011. Early work was straightforward and within three months the majority of the system was up and running. The company's leadership group of approximately 25 staff was given full access to the QlikView software, enabling them to read, filter and run reports for themselves.

"We had some challenges around the ChangePoint side of things but these were expected and we are now at the stage of going through UAT [user acceptance testing]. This should be completed within the next quarter and then we'll roll out read only access to the rest of the users. Everything else was very straightforward. Financial data is coming in to the system and everything is working," Taylor explains.

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Benefits

Even without input from the Changepoint platform, QlikView has helped to streamline reporting time. "We no longer go through the same amount of effort that it used to take to put together management information to release to our stakeholders. Once month end reports are prepared, it takes just half an hour to get the information out to everyone," Taylor states.

Interactivity is also proving popular. Reports are sent as a link so that stakeholders can view, filter and analyse the data according to their own requirements. The CFO and CEO, for example, may be most interested in company-wide metrics while office partners are more likely to want to examine the results by geography. "The analysis can be done very simply by users and it saves us having to produce multiple P&L statements and reports," Taylor says.

Another important benefit is the access to real time data. For example, users can check data relating to key accounts, drilling down into the status of current and past projects, comparing actuals versus budgeted revenue to gain an instant understanding of how a client engagement is progressing. "Previously we had to wait until we'd closed end of month to distribute that kind of information and even then there'd be extra time for specific analysis by industry or company. Now it's live data every day," she adds.

"It's been 18 months since we started working with Professional Advantage. We've been really happy with everything that they've done for our systems and with their ongoing suggestions for improvement."

Business intelligence [BI] has also helped Litmus to retain its open and transparent approach to sharing information with staff. Taylor explains, "This was key for us. We've always been very transparent. It's a big part of our culture but we were aware that as a company expands, transparency is not always cost effective, nor is it easily achieved. With QlikView we've been able to put an umbrella across all our systems and we are still able to keep the information that people should have out there within our environment."

Taylor comments, "It's been 18 months since we started working with Professional Advantage. We've been really happy with everything that they've done for our systems and with their ongoing suggestions for improvement." Asked specifically about the QlikView project, she adds, "I'm excited by the opportunity. We've got a good platform and I can see we're going to have a really good year."

For more information

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