



# BIRCH & WAITE

leverages BOARD and Professional Advantage  
to support rapid growth



BIRCH  
&  
WAITE

## AT A GLANCE

### Company

Birch & Waite Foods  
Pty Ltd

### Industry

Manufacturing & Supply  
Chain Management

### Location

Marrickville, NSW  
Revesby, NSW

### Solution

Enterprise Planning and  
Forecasting

### Key Points

- Realisation of rolling and on demand forecasts previously unobtainable
- Remove reliance on Excel spreadsheets for financial reporting and forecasting
- Enhanced forecasting capabilities allowing the interrogation and interpretation of data
- Key productivity wins around allocations, report mapping, integrating demand data providing significant time savings and master data and transaction integrity
- BOARD has become a crucial input to Birch & Waite's Integrated Business Planning (IBP) processes
- Critical decision input to growth and capital investment strategies.



## Objective

To implement a corporate performance management solution that would deliver Annual plans, rolling forecasts, on demand scenario planning and financial performance reporting, and to support sustainable growth and investment strategies.

## Background

Birch & Waite is an Australian food manufacturer with around 130 employees. Its products include fresh mayonnaise, dressings, sauces and desserts, which are used by leading brands such as KFC, McDonalds, Pizza Hut, Lite & Easy and Woolworths. Superior quality, integrity, passion and continuous improvement are at the heart of this innovative company's core values.

## Challenge

As a diverse business trading in multiple segments – and with complex supply chains – Birch & Waite depends on analytics and reporting to:

- Understand current performance
- Forecast future business growth

For many years, the company had relied on Excel spreadsheets to capture and forecast financial information. This approach was time-consuming and prone to error and version control issues. It also lacked the sophistication to provide accurate forecasts with ease. Given the time involved in preparation it was deemed an impossible task to move to rolling forecasts.

Birch & Waite needed a single streamlined corporate performance management tool. The solution needed to:

- Enable accurate forecasts
- Incorporate assumptions
- Leverage Dynamics AX and Demand Planning data
- Provide rolling 18-month forecasts to support business growth and risk mitigation

## Solution

Birch & Waite assessed a range of tools to meet its data and forecasting needs. It selected Professional Advantage and BOARD, which provides a single version of truth in one analytical environment, due to its strong performance in BARC's Planning Survey, and Professional Advantages acumen and understanding of its rolling forecast needs.

Professional Advantage designed, developed and implemented a BOARD solution perfectly suited to Birch & Waite's needs. Key features included:

- Integrated business planning, including rolling 18-month quarterly forecasting
- AX and demand planning
- Payroll integration, budgeting and forecasting
- Ability to separate reports according to organisational structures and hierarchies
- Integrated asset planning capabilities

With imminent growth plans, Birch & Waite needed a solution that could be implemented quickly without requiring additional resources. As a result, Professional Advantage ensured that the BOARD solution was user-friendly, intuitive and low maintenance, so it could be managed by the finance team within existing resourcing capacity.

Implementation was completed in 2012 after three months of design and development effort.

## Results

In the five years since implementing BOARD, Birch & Waite has experienced significant improvements in its corporate performance management.

- **Productivity gains** - operational staff have experienced time savings, as BOARD has automated work that previously required excessive manual work in Excel spreadsheets. The ability to manage report mappings has allowed for greater flexibility in mapping AX logic to multiple report requirements, and previewing and deploying results with a single click.



*"The company never stands still when it comes to overcoming challenges. It's about staying on top of our game. We needed to make sure our forecast aligned with what we were planning to do, and that it correlated to our integrated business planning and sales and operational plans."*

Lisa Hennig,  
CFO, Birch & Waite





*"There's no comparison between BOARD and our previous systems. Compared to other systems I've used in larger companies, BOARD is the best."*

Lisa Hennig,  
CFO, Birch & Waite



- **Accessibility** - BOARD enables all staff to work from the same data with an accessible and easy-to-use platform, and offers on line self-service Departmental and Financial reports which drill down to transaction by Market Segment, Brand or Customer. It also provides full visibility of comparative rolling plans to assist gap analysis, assess the financial impact of opportunities and vulnerabilities and ensure strategic alignment
- **Simplicity** – BOARD allows for complex allocations with numbers from marketing spend, production volume, and revenue, as well as the ability to flex and apply a factor, run an allocation, and assess the immediate impact.
- **Business insight** - with enhanced forecasting, reporting and analytical capabilities, BOARD has made it substantially easier for operational staff and senior management alike to access, interrogate and interpret data. In turn, staff have

a clearer understanding of business performance. It has also allowed for the setting of targets for factors such as trade promotions, marketing spend, and modelling outcomes and scenarios on the fly.

- **Streamlined budgeting** - after unsuccessful attempts to manage budget allocations in Dynamics AX, Birch & Waite migrated full planning and forecasting functions to BOARD, with positive results. BOARD also allows for easily maintained rolling plan horizons and generation with 5 click through steps, assimilating source data from AX and Demand Planning applications.
- **Responsiveness** - BOARD has made it easier to answer bigger picture strategic questions about Birch & Waite's operations. Staff can answer questions like 'What's our outlook?' 'Where are we heading?' and 'Where will we finish this year?'. With the ability to respond to questions in minutes rather than hours, Birch & Waite is more agile and responsive.



## Future plans

Birch & Waite is considering expanding its use of Professional Advantage's BOARD solution across other parts of the business.





## Enabling *High Performance* Workplaces

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### ABOUT PROFESSIONAL ADVANTAGE

Professional Advantage is one of Australia's most awarded solutions providers, with over 25 years experience in helping organisations improve their business systems through industry leading software solutions. Our 250-strong team in 6 offices across Australia and internationally has successfully worked with over 1000 organisations.

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