



## SudOcean S.A. increases planning efficiency by 80 percent

*Adding business value to the budgeting and forecasting process with Kepion and Microsoft SQL Server 2008 R2*

---

### PROFILE

SudOcean S.A. is a multinational shipping agency headquartered in Chile with multiple business units in Argentina. SudOcean has six business units, with over 50 types of services provided to more than 500 customers.

### SITUATION

As SudOcean continues to grow at a rapid rate, its subsidiaries demanded higher quality and standardization of information. SudOcean knew that manual, spreadsheet-based financial reporting and budgeting would not be sustainable in the long term. The company decided to automate and accelerate their consolidation and budgeting process.

SudOcean is one of the leading providers of representation services for maritime port operations, oil & gas shipping and freight forwarding. It is headquartered in Chile with operations in Latin America and Central America in countries with Peru, Colombia, Panama, Uruguay, Brazil, Chile, Argentina and Ecuador.

In the past SudOcean used spreadsheets to support their annual budget process, but since the company switched to Kepion to streamline their process, finance has realized faster turnaround and increased accuracy of their budget data year after year.

### CHALLENGES FACED

SudOcean has been facing rapid growth within all their business units and subsidiaries. As a result, there has been increasing demand for budget accuracies and standardization of information. Both finance and IT faced difficult challenges in manually reconciling budget data through spreadsheet files. This involved a high effort in consolidation information that resulted in inaccurate information and misplaced efficiencies.

---

***"Thanks to the flexibility of Kepion we can assemble forms in a standardized format. We can easily schedule budget distribution rules without any problems."***

*-Ariel Severo, Systems Manager*

---

---

## SOLUTION

Partnered with BI Applications, SudOcean was able to realize a full budgeting solution for their sales, expense and HR groups.

Kepion Modeler is also used to generate the data models for SudOcean's dashboards generated through SharePoint 2010 and Excel 2010 PowerPivot.

## RESULTS

- > Increase budgeting efficiency by 80%.
- > Eliminate inconsistency and duplication of data.
- > Provides a single solution for analyzing data from multiple sources.
- > Streamline planning, budgeting and forecasting process.

## CHOOSING THE RIGHT SOLUTION

Working together with a local Kepion partner, BI Applications was able to deliver a budgeting and reporting solution that hit all of SudOcean's key criteria's. BI Applications initially built a prototype to demonstrate how SudOcean's Sales, Expense and HR modules can be built within Kepion. SudOcean immediately saw value and commenced the project to start to reach the next year budget start date.

"Thanks to the flexibility of Kepion we can assemble forms in a standardized format. We can easily schedule budget distribution rules without any problems." says Ariel Severo, Systems Manager, IT, SudOcean.

---

***"... the Kepion generated cubes could be used as real-time data feeds to our PowerPivot dashboards for a consolidated view of the company."***

*- Sebastian Favilla, Finance Planning Lead*

---

## BOOSTING BUDGETING EFFICIENCY BY 80%

With Kepion, SudOcean was able to standardize and automate their budgeting process that allowed finance to eliminate any data inconsistencies and duplication of data. This enable finance more time for analysis, and less time recovering. In fact, the organization was able generate replacement versions to fix actuals in budgeting months prior to use of Kepion.

---

## SOFTWARE COMPONENTS

- Kepion Planning 3.0
- Kepion Modeler
- Microsoft SQL Server 2008 R2
- Microsoft SharePoint Server 2010
- Microsoft Office Excel 2010
- Microsoft Windows Server 2008

## QUICK DELIVERY

SudOcean and BI Applications was able to take advantage of the Kepion Modeler that enable their IT to quickly prototype, build and deploy BI applications not only for budgeting, but also for their PowerPivot dashboards. The same data models generated by the Kepion Modeler were also leveraged with Microsoft SharePoint Server 2010 and PowerPivot Dashboards to create rich reporting for management. This enabled SudOcean to have real-time view of the organization.

## BENEFITS REALIZED

Kepion has provided SudOcean with the capabilities to standardize and automate their entire budgeting and forecasting process. Because Kepion is built on the Microsoft BI platform, SudOcean is also able to leverage their existing investments in Microsoft with the Kepion Modeler to build the backbone to their BI infrastructure.

“The Kepion generated cubes could be used as real-time data feeds to our PowerPivot dashboards for a consolidated view of the company.” says Sebastian Favilla, Finance Planning Lead, SudOcean.

---

### FOR MORE INFORMATION

For further information please visit: [www.kepion.com](http://www.kepion.com)

### CONTACT US

To request a call or to ask a question, go to:  
[www.kepion.com/contact](http://www.kepion.com/contact)

### ABOUT BI APPLICATIONS S.A.

BI Applications is a professional consulting firm that focuses on implementing the latest technologies of Microsoft BI Platform. We help customer realize the strategic direction and implementation path for developing corporate performance management solutions. For customers of Kepion, BI Applications provide implementation services, support and training.

### ABOUT KEPION

Headquarter in Seattle, WA, Kepion is the leading provider of planning, budgeting and forecast solutions for mid to large size enterprises. Kepion is built on the Microsoft BI platform powered by SQL Server Analysis Services engine.

Kepion provides an entirely web-based planning solution founded on the principle "Simply Flexible: Providing simple access & navigation to the information you need, combined with a fully flexible platform to build solutions that fit around your key business functions."

