



Uniting Church in Australia gains greater financial insights with Kepion

Shrinking financial reporting, budgeting and planning overheads for a rapidly growing business

PROFILE

The UCA is a non-profit organization and is the third largest Christian denomination in Australia with has 2,800 congregations, 51 presbyteries and 6 synods.

SITUATION

UCA needed a solution to manage their budget allocation model across all their internal clients. IT needed a easy-to-manage solution to handle complex rule calculations and form entries.

Uniting Church of Australia (UCA) is a non-profit organization and the third largest Christian denomination in Australia with 2,800 congregations, 51 presbyteries and 6 synods. There are over 50 locations connected to the network with approximately 1000 client devices that are supported by a central Help Desk. Over the last 5 years, the IT department has grown to support 2500 staff (from 150 staff).

In 2011, UCA selected Kepion as their solution provider for their financial budgeting allocations needs. Kepion partnered with BizData to implement and support the solution for UCA.

GROWTH CHALLENGES

Uniting Church of Australia has recently grown tremendously in the last 5 years from 5 to 20 internal clients. It became progressively difficult to calculate forecast income and recoverable costs, identify direct and shared charges, conduct what-if analysis and ensure the budget was prepared for both financial and calendar years. As the client base grew, the business rules became more complex and more time consuming to manage on Excel spreadsheets.

SOLUTION

UCA was able to simplify their budgeting process with automated functionalities within Kepion, thus increasing their overall efficiencies by 10x folds.

RESULTS

- > Flexibility: Handle complex charge calculations
- > Reusability: Leveraging existing models
- > Scalability: Adding new clients, devices with ease
- > Usability: Ease of conducting 'what if' analysis

FASTER BUDGETING WITH KEPION

Kepion provided UCA with the capabilities to quickly build planning and reporting applications to reduce the reliance on spreadsheets. UCA IT was able to handle all their complex business rules and budgeting requirements. Kepion allows UCA to conduct 'what-if' analysis, which allows users to change parameters and see what the effects are, which was particularly important given their dual charging model of direct and shared.

"... For me, the key benefit of Kepion is the flexibility of being able to rapidly calculate charges and apply variations."

-Pier Fasnacht, Director of Information Technology Services

With Kepion, UCA IT was able to provide variable driven allocations across the entire client base from a simple form-driven matrix held within the model. This development enabled UCA to easily change allocation rules, without having to deal with the underlying logic.

"There are aspects of Kepion that are very simple. Loading in the budget, to expenditures, to classification of the number of devices is all very easy within Kepion. Now within Kepion, we can do new pricing for a client by just changing a few parameters. It would show me the new pricing for a client, along with favorable variances based off existing clients. This used to take 10 days before, but now with Kepion, it can all be done within a single day"

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

SIMPLIFYING THE PROCESS

With Kepion, UCA was able to automate their process for calculations, consolidations and budget balances between departments.

“Before, if our users wanted to refresh the spreadsheet data, they would have to reapply all the logic and recalculate all the rules at cost pool level and consolidate. Then the spreadsheets needed to be manually balanced to budget.” says Pier “Now with Kepion, it recalculates everything for us automatically and ensures that our bottom-line will balance. If it doesn’t balance, we would immediately know what the root cause is.”

FLEXIBILITY

UCA has been using Kepion Modeler to create business intelligence applications for both their planning and reporting needs. With Kepion, UCA IT was able to leverage and make quick modifications to applications in order to adapt to changing requirements.

“For me, the key benefit of Kepion is the flexibility of being able to rapidly calculate charges and apply variations. For example, if I wanted to modify the number of devices, which drives the costs, and see what the impact will be based on different assumptions, it can all be easily done within Kepion,” says Pier.

RESULTS

Kepion has helped UCA improve in their overall efficiencies for planning and budgeting processes across all their line-of-businesses. With Kepion, UCA IT has been able to handle on-going complexities of their user requirements. The ability to reuse existing models for different business scenarios, and unique scaling capabilities has shown UCA that Kepion is a viable long-term solution within the organization.

FOR MORE INFORMATION

For further information please visit: www.kepion.com

CONTACT US

To request a call or to ask a question, go to:
www.kepion.com/contact

"Kepion allows us to actually refine the allocation month by month to reflect major steps that is expected in the future" says Pier. "Kepion is a sophisticated tool that easily manages a complex business environment."

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."

