



Business Objective

- The client faced challenges in A&P Spend Tracking and budget planning, lacking a robust tool for the entire Australian and New Zealand region. The financial planning process needed enhancement.
- Key challenges included:
 - A&P spend tracking in AU and NZ relied on over 30 Excel spreadsheets, each with complex macros.
 - Brand managers experienced issues with disappearing formulas, requiring static columns, rows, and cells to prevent macro breakdowns. This resulted in an unfavorable visual user experience and additional steps for brand managers.
 - Analysts encountered significant delays as macros took considerable time to execute. Broken macros necessitated manual consolidation of 30+ Excel worksheets during critical month-end periods.
 - Over time, the macros became temperamental, lacking a sustainable resolution.
 - The Lock, Consolidate, and Roll-Over cycle needed a chronological order, but the current system required waiting for Excel Macros before each subsequent step.
 - The use of Macros constrained Excel for other purposes, limiting its functionality.

Client

- Our client is a global snacking leader. Its extensive portfolio that includes many iconic brands. With a well-developed worldwide distribution network, they maintain a strong presence in crucial international markets, including Europe, Latin America, and Asia Pacific regions.

Industry

- CPG

Function

- Finance Controlling

Technology

- Anaplan

The Solution

- The TekLink Team presented a comprehensive solution for A&P Spend Tracking, encompassing the following components:
 - Brand Managers can create/edit spend lines within their specific cost buckets.
 - The solution incorporates functionality to roll over planned data from the previous scenario, establishing a baseline for comparison.
 - A planning template for locking in actualized period data was constructed by the Team.
 - The solution facilitates the export of both consolidated and summary variance reports.
 - An automated “Actual Vs. Planned” comparison report is seamlessly generated at the GL-ION level within the solution.



Outcomes and Benefits

- The solution saves around 100 man-hours annually.
- It establishes a more controlled and robust system, allowing for guided data uploads.
- Automated reconciliation between detailed and dashboard views is seamlessly implemented.
- Robust security measures at the Brand/Cost Bucket level enhance data control.
- Instant access to consolidated brand-level reporting, planned vs. budget reporting, and actual vs. planned reporting is achieved effortlessly.
- The system is error-free, auditable, and consistently maintains high performance.
- The closing process is streamlined, ensuring timely submission.
- Substantial improvements in user experience led to a notable reduction in manual and Excel workload.
- Leveraging the Anaplan solution introduces a variety of new functionalities for reporting and analytics.