

CASE STUDY

Marshalls creates a better BI landscape with Anaplan XL Reporting

Customer background

Marshalls is the UK's leading manufacturer of superior natural stone and innovative concrete hard landscaping products. It was established over 130 years ago and supplies the construction, home improvement and landscape markets, specialising in a wide range of products, design services and technical expertise.

The Marshalls Group operates a diverse portfolio of business interests from managing its own quarries through to manufacturing goods and running regional service centres. It employs over 2,000 people across sites in the UK, Europe and China.

The challenge

Marshalls has had a mature and wide-ranging data warehouse developed for over ten years, founded on Microsoft SQL Server and Analysis Services. Having recently completed a major project to implement Microsoft Dynamics AX across all their businesses they now have access to reliable and consistent data and have been able to extend their OLAP cubes to all businesses divisions and all the main functions of the group, including sales, purchasing, finance, and manufacturing.

Marshalls used ProClarity as their main analytical reporting tool for ad-hoc and management dashboard reporting. ProClarity had given good service but as it was no longer being developed, Marshalls needed to look for a replacement that retained the ability of ProClarity to deal with complex hierarchies but was also future proof. ProClarity was suffering increasing compatibility issues as Marshalls upgraded other software, and in particular the ProClarity Excel add-in was only supported up to Excel 2003.

Marshalls recognized that a new solution could offer to automate their reporting and reduce the manual spreadsheets that were often used for management reporting. They also needed a better solution to distribute reports to avoid 'multiple versions of the truth'. The solution would need to leverage their existing investment in their Microsoft data warehouse. The power users tend to work in Excel, so strong Excel integration was an important consideration. Microsoft SharePoint is used extensively so a solution where reports could be integrated into the existing SharePoint site was also key, providing an ideal solution to replace their existing management dashboard spreadsheets.



We've invested in implementing Microsoft technologies through our business. Anaplan XL Reporting now forms a core part of our BI strategy and will allow us to get the most from the vast amount of information we have in these systems, and help maximise our investment in them".

Andrew Worsley,
Information Systems Programme Manager, Marshalls

Customer profile

Region: UK/Europe/China

Industry: Construction and landscape

Business situation

Marshalls needed to upgrade its reporting and analytical client tools to help fully realise their investment in the Microsoft BI platform, and provide 450 users of varying expertise with a flexible self-service model.

Solution

After a detailed evaluation phase, Anaplan XL Reporting was chosen to replace and extend the legacy ProClarity implementation.

Power users have the Excel edition, and the ability to produce reports and dashboards for wider distribution through the simple web publication process, without the need for IT involvement.

Management, lighter users and report consumers access the published reports, and have slice and dice analysis through Anaplan XL Reporting.

The solution

Marshalls carried out an initial evaluation of a number of solutions that could work with their existing data warehouse. From the early stages, Anaplan XL Reporting stood out as the clear favourite, in part as it was an Excel add-in and the users were already comfortable in Excel, but also because it could easily handle the complex hierarchies that Marshalls needs to analyse the business. The web edition also offered a solution for automating the management team's daily dashboard reports, and a way to distribute the reports to the full user community. Marshalls carried out a thorough evaluation of Anaplan XL Reporting with a number of the key users in the group.

Andrew Worsley, Marshalls information systems programme manger for finance and business intelligence, commented, "Anaplan XL Reporting provided all the support we could ask for to carry out a thorough evaluation over a number of weeks. They were clearly confident of the product's abilities. Many software vendors show limited demonstrations of the product but don't let you have such full use of it for fear you uncover its limitations. We were able to prove that Anaplan XL Reporting would meet all our requirements. We knew we were making a big commitment for the business to replace the ProClarity reports that had been developed by many people over a number of years so we had to make the right choice".

Andrew continued, "The support we received during the evaluation also gave me confidence that Anaplan would provide an excellent level of service once we had decided to purchase the software, and that has proved to be the case. Their support is superb, whether it's the initial installation of the software or questions on how to use and get the best out of the product. They have been great recently helping us to make our management reporting".

A new landscape

Anaplan XL Reporting's deep Excel integration has allowed Marshalls to consolidate data from a number of different sources into interactive reports. Users can carry out the complex statistical analysis required by some reports, and use Excel's native charting augmented with Anaplan XL Reporting's visualization tools to present the information interactively. Reports can be developed by analysts, removing the dependency on IT development resource, and are published to the Anaplan XL Reporting and embedded within SharePoint so there is a central source for dashboard reporting and no issues with versioning. The reports can then be used with no requirements for software installation on the users machines, and minimal training. Andrew says,



It is ever more important for the executive team to have access to the information we need to run the business wherever we are and whenever we need it. Anaplan XL has helped us deliver that capability."

Chris Harrop,
Group Marketing Director,
Marshalls

"We've focused on creating reports that are intuitive to use. The end users need little or no help to use the reports, but the web edition in itself is very powerful and allows users to go a lot further if they wish. We've been able to use the new ProClarity conversion tool to quickly convert existing reports and now also have access to the dashboards on iPads which works really well too".

Marshalls have successfully completed the initial management dashboard replacement project, and rolled out Anaplan XL Reporting to 150 key users for their ad-hob reporting, but as Andrew describes, they intend to go a lot further. "We have already done more with the product than we initially envisioned, for instance delivering automated customer service measures for our operations in Europe. We have a number of initiatives where Anaplan XL Reporting will allow us to vastly improve our reporting in areas such as production and finance, to replace bespoke systems. The product was already superb but keeps getting better with each release. The SQL features in v7 will help us create reports combining OLAP and SQL data, and allow users to see high level KPIs but then drill into these quickly to understand the lower detail.

We've invested in implementing Microsoft technologies throughout our businesses. Anaplan XL Reporting now forms a core part of our BI strategy and will allow us to get the most from the vast amount of information we now have in these systems and help maximise our investment in them".