



Use cases:

- Management reporting
- Financial and operational KPI dashboard

Challenge:

- Many hours spent gathering financial data to produce a monthly management report from spreadsheets and planning systems
- Management reporting only contained financial KPIs—not a comprehensive view of business metrics

Solution:

- Capture financial and operational KPIs in one dashboard
- Comprehensive monthly reporting of all departmental and business metrics
- Create unified monthly management report with all financial, operational, sales and customer data

Results at a glance:

- Eliminated data aggregation from one day per month to only a few hours per month
- Decisions now based on single source of information with a comprehensive view of the business



Riksbyggen, one of Sweden's leaders in property management, builds stronger reporting capabilities with Anaplan

Introduction

Riksbyggen is one of Sweden's largest property management companies. Building and managing residential, commercial, and public buildings, Riksbyggen is a cooperative, responsible for 10 percent of all housing built in Sweden. Founded in 1940 to address the shortage of housing and jobs in Sweden, Riksbyggen has grown to over 2,300 employees and manages housing for over 350,000 people.

Today, Riksbyggen manages over 2,600 housing co-operatives including about 170,000 apartments and an additional 100,000 rented apartments. Last year alone, Riksbyggen built approximately 1,000 apartments. With this level of success and growth comes the complexity of tracking and measuring logistics, plus reporting the business success at scale. With margins getting slimmer, Karin Jacobsson, Senior Director of Finance at Riksbyggen knew her team needed to find a more efficient and cost-effective way to deliver management reporting.



In this single monthly report, we're able to not only report out financial KPIs but sales figures, customer metrics, the number of orders and stock at the regional level, our vendor metrics, and even operational KPIs. Whereas, before Anaplan, we were only reporting financial metrics.



Before Anaplan

Prior to Anaplan, Riksbyggen managed all financial information between many legacy systems and spreadsheets. Monthly management reports were manually created in spreadsheets, which led to many hours of time-consuming and tedious work. Before Anaplan, due to the lack of accessibility or visibility into departmental metrics, the management reporting only contained financial KPIs. This limited insight into departmental metrics put the executives at a disadvantage to truly understand the performance of the business.

Responsible for all financial and management reporting across the business, Jacobsson's team works closely with business unit controllers across the company. She knew that during Riksbyggen's continued growth, she and her team needed a more efficient way of creating and reporting out financial metrics to the business.

Why Anaplan

"We had been considering finding a more efficient reporting strategy that provides better quality results. But with our three-year ERP implementation project in progress, I figured we couldn't solve our reporting issues until we had this new system and process in place," recalls Jacobsson. "We were not actively evaluating planning and budgeting tools. When we came across Anaplan, I knew it was what we needed and,

more importantly, realized that we didn't have to wait years to get it up and running."

The requirements for management reporting continued to expand and having to wait years for the ERP implementation to complete was not realistic. Riksbyggen needed to keep pace with the growth of their business. Jacobsson gleaned that Riksbyggen could implement Anaplan quickly and manage the roll out in short sprints. With this approach, she and her team would avoid overwhelming the business and, at the same time, make a meaningful impact both immediately and into the future.

Implementation and deployment

"The implementation of Anaplan was much faster and simpler than any other software implementation I've encountered. Our team worked side by side with the Anaplan so that we understood exactly how the models were set up and had a deep understanding of the capabilities of the tool for the future as we expand our use case."

With Anaplan's agile implementation approach, Riksbyggen was able to make changes to their models and reports while keeping the project in scope. While implementing Anaplan, Riksbyggen identified the opportunity to fix some master data aspects too, helping better streamline the financial process. Previously Riksbyggen's reporting processes could not be as

tightly defined due to the nature and limitations of Excel® spreadsheets. Because of this, they found it impeded the accuracy in reporting. With Anaplan's automatic aggregation of the numbers, Jacobssen's team now can confidently report out from one central source, providing an accurate view into the health of the business.

Benefits

"Before Anaplan, I spent a lot of time just verifying that what the business controllers were reporting was correct. Now I am able to spend time asking relevant questions, identifying the business opportunity, and improving the value of the reports for the management so that they can make better decisions towards the business," said Jacobsson.

Prior to Anaplan, members of Jacobssen's team each spent a minimum of a full day gathering the financial data needed for monthly management reports. Now with Anaplan in place, only a few hours a month are spent creating and sharing the reports. Freeing up many hours per person on her team means they now have time to analyze the numbers rather than just gathering and consolidating data. Not only is management happy with the results and metrics they are seeing with Anaplan, but end users are now able to align expectations with bottom-up planning and reporting.

Additionally, with the time-consuming process of gathering data, the previous management reports were only able to

contain financial KPIs. "With Anaplan, our management reports now are a comprehensive view into the health of the business. In this single monthly report, we're able to report out financial KPIs, sales figures, customer metrics, the number of orders and stock at the regional level, our vendor metrics, and even operational KPIs," said Jacobsson. "Our management team has a much more realistic and holistic view into where our business stands."

What's next?

Riksbbyggen's success with Anaplan has led to a future vision for expansion within the business. Jacobsson's vision is to expand the use of Anaplan into its housing construction and sales department project plans and reports. Additionally, as the ERP implementation takes shape (which will include a BI system), the use of Anaplan will expand and compliment the system. With the combined power of Anaplan, a BI tool, and a new ERP system, Riksbbyggen will be able to drive consistency across all data and better align decisions company-wide.

"Our business controllers are saving a substantial amount of time and are able to provide more detailed and accurate insight into the business," said Jacobsson. "We received a really great response from the management team on the insight we're providing them via Anaplan. They were eager to share the new insights and detailed reports with the regional and departmental managers."

About Us

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