

Long-term planning pays off in optimised resource usage

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Julie Cave - Finance Systems Manager, Reading Borough Council



Challenge

Reading Borough Council provides local government services to 144,000 people in an area of 40 square kilometres in southeast England. A magnet for growth and wealth creation, Reading has two universities, is home to several top IT and insurance companies and is in one of the UK’s fastest growing areas.

With annual expenditure of £340 million, effective financial planning is essential to achieving the Council’s aim of continually improving the quality of its services, while also minimising council tax increases. It also needed to deliver three and five-year budget forecasts to meet its own internal budgeting needs, which also brought the Council in line with government requirements to monitor its progress against the 2.5% year on year efficiency savings required by the Gershon Review.

Julie Cave, Finance Systems Manager, Reading Borough Council, says, *“The need for more integrated medium and long-term financial planning had been rearing its head for a number of years. Not only would it enable us to prepare timely, accurate multi-year forecasts, without the need to divert financial teams from day-to-day tasks, but also comply with government forecasting regulations.”*

The Council had been preparing its annual budgets using Oracle Public Sector Financials International (OPSFI), Oracle Financial Statement Generator and Excel. *“The Oracle tools met all our requirements for annual general ledger-based budgets,”* confirms Julie Cave. *“However, the introduction of longer-term plans meant we needed advanced cross-directorate, multi-dimensional modelling and the ability to assimilate continual adjustments at cost centre level into our central planning.”*

Solution

Reading Borough Council chose Fujitsu to implement Oracle Hyperion Planning Plus. Its Microsoft Excel and Web-based budgeting and forecasting tools give planners a sophisticated yet easy-to-use OLAP-driven enterprise-wide planning solution that delivers advanced medium and long-term forecasting with a high degree of accuracy.

Hyperion Planning Plus also meets local government requirements for devolved budgeting and central planning across a complex management structure. So, throughout the highly iterative, four month budget planning process, the Council’s financial controllers have real-time visibility of data that used to be hidden in end-user systems.

Explaining the decision Julie Cave says, *“As an existing user of Oracle Financial we didn’t want to implement lots of third party applications that worked departmentally. So, initially we looked at using Oracle Enterprise Planning & Budgeting (EPB), but Hyperion was capable of so much more, so our decision was largely influenced by the long-term benefits.”*

As well as project managing the implementation of Hyperion Planning Plus, Fujitsu is also providing a fully managed service

SUMMARY OF KEY FACTS

Organisation

Reading Borough Council

Services delivered

Implementation of Oracle Hyperion Planning Plus, including a fully managed service, technical support, regular service reviews and on-going strategy consultations

Key metrics

- 144,000 citizens
- 5,000 employees
- £340 million annual expenditure

Benefits

- **Increased productivity** – streamlines processes and optimises resource usage, with significant time savings
- **Improved forecasting** – meets short-term budgeting needs, while also enabling long-term, central planning
- **Ensured compliance** – meets the Council’s reporting needs, while also satisfying government requirements
- **Maximised visibility** – supports devolved planning with real-time visibility and predictability of forecast data at every stage of the budgeting cycle
- **Enhanced flexibility** – provides a platform for future cross-functional expansion and automated process integration

with first and second line technical support, regular service reviews and on-going strategy consultations to help the council maximise the value of its technology investment.

“We had a restricted budget and tight timescales, but Fujitsu worked really hard to provide a solution that was affordable,” comments Julie Cave. *“We were also confident that working with Fujitsu would enable us to optimise the benefits of Hyperion Planning Plus and gain a rapid return on our investment.”*

Debra Lilley, Principal Business Consultant, Fujitsu, and Deputy Chair of the UK Oracle User Group, explains, *“Reading Borough Council faced similar requirements to many other local government organisations, needing to achieve a great deal with very limited resources. It achieved its objectives because of Fujitsu’s approach of listening to a customer and designing a solution delivered with them rather than simply to them.”*

Despite only starting the implementation in April, the new solution had to be ready in just three months, so that the Council could start producing its next five year plan on 1st July. *“We just went for it with a ‘big bang’ approach and it went really well,”* continues Julie Cave. *“Fujitsu successfully delivered it all on time and budget. But we were confident of our success, because we’d thoroughly examined the software with Oracle and had enormous confidence in the project management experience and technical resources of Fujitsu and the functional expertise of its partner, Paragon.”*

As well as rationalising the Council’s spreadsheet-based forecasting environment into a single, collaborative, council-wide planning system, Hyperion Planning Plus’s spreadsheet-based look and feel ensured rapid adoption by the Council’s users, who were able to produce accurate medium and long-term budget forecasts for four directorates and 800 cost centres in just two months. *“One of the major advantages of Hyperion’s intuitive, spreadsheet-based interface is that it frees users from the need to understand the complexity of the underlying tools,”* explains Julie Cave. *“They can also conduct granular analysis and input new intelligence, which then becomes immediately available to their colleagues and the central financial team in real-time.”*

Hyperion Planning Plus will also enable the Council to respond to future government changes to local authority reporting without increasing headcount.

“Fujitsu provided us with a solution that interacts with Oracle to give us a comprehensive business forecasting tool,” says Julie Cave. *“It gives us better management information and will enable better use of the Council’s resources in the longer term as we can now ‘slice and dice’ information to see the effects and do modelling, which is a capability that we never had before. It has also given us the building blocks of a solution that can grow with the organisation and deliver much bigger longer term benefits.”*

Benefits

The Oracle Hyperion Planning Plus solution implemented by Fujitsu is enabling Reading Borough Council to:

- **Increase productivity** – the system’s advanced functionality and easy to use interface streamlines processes and optimises resource usage, with significant time savings being achieved without the need to re-input spreadsheet information
- **Improve forecasting** – granular, multi-dimensional data analysis and modelling capabilities meet short-term budgeting needs, while also enabling continual adjustments at cost centre level to be combined into long-term, central planning

- **Ensure compliance** – meets all of the Council’s reporting needs, while also enabling it to satisfy government requirements for budget forecasting
- **Maximise visibility** – collaborative, web-based tools, using tightly integrate financial and operational planning models, support devolved planning with real-time visibility and predictability of forecast data at every stage of the budgeting cycle
- **Enhance flexibility** – provides a platform for future cross-functional expansion and automated process integration to enable greater efficiency and operational synergy.

“Oracle Hyperion Planning Plus generates substantial time savings at every stage of the budgeting process and enables us to deliver timely, accurate medium and long-term budget forecasts without the need for additional resources and without changing our existing processes or organisational structure,” comments Julie Cave.

“We also have the added benefit of giving the central finance team full visibility of each cost centre’s plans at every stage of the budgeting cycle. Our cost centre managers used to store forecasting information on personal spreadsheets, so there was no visibility in the creation process. Now we can access and analyse this data at any time in order to assess our current position.”

Approach

Reading Borough Council chose Fujitsu to implement the application based on its commitment to the Council’s success and its innovative implementation approach that met the needs of all parties.

“Fujitsu acted as the main point of contact for the implementation of Hyperion Planning Plus and we worked side by side with them. Its standardised yet flexible approach cut waste and cost while ensuring that all of our requirements were met,” says Julie Cave. *“It also has a fantastic Oracle knowledge that is second to none, so we didn’t have any issues. As far as I’m concerned, Fujitsu just did it for us - I didn’t need to know the ins and outs of what was happening, because I knew there weren’t any problems and we got a fully working solution when it was needed.”*

Expertise

With over 40 years experience of supporting the needs of customers, Fujitsu has a proven track record in providing complex systems integration and management services that reduce costs, improve productivity and customer services and deliver a compelling return on investment. In particular, Fujitsu has more than 4,000 Oracle and SAP specialists worldwide and extensive experience in creating practical ERP solutions and supporting customers.

Julie Cave adds, *“Fujitsu implemented our original Oracle Financials system more than ten years ago and has been supporting it ever since, so we have a long-standing relationship that works really, really well. We feel very valued as a customer and I believe we’re really working in partnership at all management and operational levels.”*

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