

Qlik® & Jedox

Combine Qlik® and Jedox for Integrated Enterprise Planning and Performance Management

World-class analytics with Qlik® but still planning in spreadsheets?

Data and analytics experts in finance, sales, and other business functions are already transforming their business with Qlik®. Yet 79% of companies state that planning and performance management involving all functions across the organization are still disconnected and based on disparate data, systems, and offline Excel spreadsheet calculations*. Therefore, it comes as no surprise that planning stakeholders complain about inconsistent, or sometimes even inaccurate, results and data that is often outdated before plans, budgets, and targets are even finalized.

Harness your valuable Qlik® insights to transform planning and performance management for all functions across the organization

Introducing Jedox for Qlik®, the integrated Enterprise Performance Management solution that connects data and insights from Qlik Sense® and QlikView® with best-rated** planning, budgeting, and forecasting capabilities. Jedox helps companies align strategic, financial, and operational goals and makes planning seamless between the office of finance and other Qlik® users in sales, human resources, the supply chain and many more.

With integrated planning across the enterprise, everyone wins:

- ▶ Finance optimizes financial planning and analysis for better decision-support
- ▶ Sales accelerates forecasting and spends less time on planning, budgeting, and reporting
- ▶ HR gains insights for headcount planning and personnel costs for improved capacity planning
- ▶ Operations obtains a clear view of demand, production, inventory, and logistics planning to enhance the service to customers and reduce costs

The Jedox solution, connected to Qlik®, simplifies planning processes, integrates analytics and performance management, and unleashes more agility and efficiency throughout the business. Discover which operational drivers are directly connected to financial and business results and use insights from smart data analytics to make better decisions.



Fig #1: Jedox in Qlik®

*The Planning Survey '18, BARC 2018

**The Planning Survey '17, BARC 2017

Finance

Partner with the business to take financial planning and analysis to a new level

Integrated Enterprise-grade Planning and Performance Management

Seamlessly integrate enterprise-grade planning and performance management in Qlik®. Use Qlik® data and analytics as input for your planning and budgeting processes and provide your planners with a flexible, intuitive planning tool embedded right in their Qlik® interface.

Efficient Planning Process Across the Business

Streamline planning processes across the entire business with powerful target-setting, allocation, and workflow capabilities. Utilize Jedox's award-winning planning, budgeting, and forecasting capabilities including writeback, comments on the cell level and approval workflows to standardize and optimize the planning process.

Automated Forecasts and Improved Quality with Predictive Analytics

Leverage predictive analytics to drive planning efficiency and automate processes such as rolling forecasts. Support business functions with predictive guidance or validate their plans and identify risks.

Fast Lane Towards Integrated Financial Planning and Analysis

Design your integrated FP&A solution with the Jedox pre-built core finance application suite. Encapsulating industry best practices, the pre-built finance applications help you build state-of-the-art solutions quickly including integration logic for profit and loss, balance sheet, cash flow, cost center, profit center, sales, and workforce planning.

Flexible Modeling and Familiar Excel Environment

Enjoy fully flexible modeling to extend the core finance suite or build custom planning applications. The powerful Jedox modeling and integration engines and the choice between the native Excel environment and a web interface empower finance users to build their own planning applications without the help of IT.

Better Decision-Making Support with Real-Time FP&A and Scenario Analysis

Update FP&A with the most current data from sales and other business functions and create driver-based analysis and what-if scenarios to provide better business decision-support.



Fig #2: Finance Dashboard & Jedox Models

What customers say

"The ability to quickly and easily adapt new Data Sources, to associate information and to implement decisions will be a crucial competitive future advantage. The combination of Qlik® & Jedox opens up whole new dimensions of limitless Business Intelligence!"

Stefan Junker, CFO, Erwin Hymer Group

ERWIN HYMER GROUP
the leisure experience

Sales

Align strategy with execution and utilize advanced forecasts to improve sales effectiveness

Automated Forecasting with Predictive Analytics

Save time and improve the quality of your forecast with powerful predictive forecasting features for sales. Leveraging predictive analytics, you can increase forecast frequency and automate continuous rolling forecasts for a more dynamic sales forecasting system.

Reduced Overhead for Budgeting and Planning

Ease the dreaded pain of planning and budgeting for sales with simple, intuitive bottom-up budgeting screens that offer complete flexibility for entering budgets by product, customer account, region, channel, and other dimensions. Write-back of manually entered values and cell-based comments make planning more collaborative and further improve the quality of results.

Alignment and Effectiveness of Global Target-Setting

Setting top-down targets and quotas with Jedox's planning functionality is simple and flexible. Break down company targets for regions, business units or account managers, or any other dimension with ease and align strategic plans with operational plans in sales. Utilize best-in-class planning capabilities such as percentage increase, seasonal allocation and multi-level approval workflows for global target setting.

Transparent Sales Performance Management

The powerful functionality for sales performance management lets you easily compare and blend multiple versions of sales budgets, actuals, and forecasts. Track sales performance against quotas and targets. Find sales performance gaps, analyze drivers, and forecast performance for the next period to identify corrective actions and build new account plans.

Shared Plans and Connected Business Decisions

Easily share plans, budgets, and forecasts with finance, human resources, marketing and other business functions without ever leaving Qlik®. Aligning sales planning with financial and operational plans empowers all functions to make connected decisions and manage performance more dynamically.



Fig #3: Sales Dashboard in Qlik®

What customers say

“The integration of Jedox and Qlik® allowed us to implement our ideal reporting environment for self-service data visualization, analysis, reporting, and planning.”

Michael Städtler, Director Digital Business Solutions, Gruner Group

gruner >

Even Better Together: Qlik® Analytics & Jedox Planning

The Jedox solution for integrated Enterprise Planning and Performance Management empowers Qlik Sense® and QlikView® users to transform their business by combining the power of leading associative data discovery with outstanding financial planning and analysis technology. The mapping of financial data to operational data provides users in finance, sales, and other business functions with the tools to drive collaboration, process automation and smart insights across the organization and maximize business outcomes.

Transform Planning and Performance Management with the Integrated Qlik® & Jedox Solution



Qlik® Analytics :

- ▶ End-user data preparation
- ▶ Fast dashboard creation
- ▶ Exploratory data analytics
- ▶ Collaborative & advanced reporting
- ▶ Data discovery & storytelling
- ▶ Augmented Intelligence & suggestions
- ▶ Associative data relationship

Finance & Business Teams



Jedox Planning:

- ▶ Data capture & write-back
- ▶ Planning, budgeting & forecasting
- ▶ Predictive forecasting & Assisted™ Planning
- ▶ Planning- workflows & governance
- ▶ Driver-based planning & what-if scenarios
- ▶ Intuitive Microsoft Excel interface
- ▶ Structured data hierarchies

Benefits of Jedox & Qlik® Solution:

- ▶ Integrated planning, analytics, and reporting across the enterprise
- ▶ AI-powered insights & foresight for planning and performance management
- ▶ Seamless, consistent data foundation for analytics and planning
- ▶ Superior ease of use and flexibility for finance and business users
- ▶ Optimized, automated process for planning, forecasting, and reporting
- ▶ Fast time to value and great modelling flexibility

jedox.

Qlik

Technology
Partner





Customer Success Story | Dätwyler

Streamlined Sales Planning for Global Enterprise Jedox Extends Qlik® & SAP to Create a Seamless Planning Environment

Customer

Dätwyler Cabling Solutions

Industry

ICT Infrastructure

Department

Finance, Sales

Solution

Global Sales Planning

System environment

Qlik®, SAP,
Jedox / Simple.Planner-Suite

Executive Summary

Global ICT company Dätwyler Cabling Solutions required a highly specialized, effective reporting process in each of the subsidiaries – and while their combination of SAP and Qlik supports high-level reporting, the sales planning process still employed SAP and Microsoft Excel. Dätwyler has replaced its Excel-based planning process with a modern Jedox solution. The new system links up Jedox and Qlik® to implement flexible reporting scenarios with comprehensive planning and analysis functions in record time. Jedox has significantly accelerated and decentralized the process of budget and forecast creation – across all its subsidiaries worldwide.

Benefits:

- Efficient operational planning across all subsidiaries
- Flexible planning environment, implemented in only 40 days
- Planning procedures now take days, not weeks

Why Jedox?

- Seamless integration with Qlik and SAP systems
- Powerful planning functionality
- Excel-like interface ensures high user acceptance
- Rapid, flexible adaptation to new planning requirements



“The Jedox planning solution has saved both Corporate Finance and local offices significant man-hours of manual number-crunching.”

Carl-Christian Eckert, Corporate Controller, Dätwyler



Customer Success Story | Gruner Group

The Perfect Combination: Jedox Planning and Qlik Reporting

Efficient project budget planning for the Gruner Group

Customer

Gruner Group

Industry

Construction engineering

Department

Finance, project leadership, management

Solution

Project planning, results reporting

System environment

BI solution Qlik®,
ERP solution ABACUS



Executive Summary

Renowned construction engineering and planning group Gruner has enhanced the possibilities of its Qlik® reporting with a planning solution based on Jedox. The seamless connection between Jedox and Qlik® offers Gruner the ideal solution for a consistent reporting infrastructure, complete with self-service reporting, instant analysis, data visualization, and agile, decentralized planning processes. Planning with Jedox is so fast, efficient, and reliable that the company has switched from quarterly to monthly planning.

Users:

- Approx. 400 users

Benefits:

- Custom planning environment, implemented in just 2 months
- Accelerated planning processes allow monthly instead of quarterly planning
- Precise overviews of over 6,000 concurrent projects

Why Jedox?

- Powerful planning capabilities
- Seamless integration with Qlik® & ABACUS ERP
- Custom-tailoring to specific planning requirements
- User-friendly interface harnesses Excel expertise
- Fast time-to-launch, high scalability

“The integration of Jedox and Qlik® allowed us to implement our ideal reporting environment for self-service data visualization, analysis, reporting, and planning – and this solution is flexible enough to accommodate change and growth in requirements.”

Michael Städtler, Director Digital Business Solutions, Gruner Group



SWISSski

Customer Success Story | Swiss-Ski

Great Preparation makes for a Great Performance

Swiss-Ski implements Planning, Budgeting and Forecasting Solution

Customer

Swiss-Ski

Region

Switzerland

Industry

Non-profit (Association)

Department

Finance

Solution

Budgeting and Planning

System environment

Qlik®, Jedox, ABACUS

Executive Summary

When most people hear the name “Switzerland“, what springs to mind is snow and mountains. A fascinating world full of challenges - as if made for sporting activities. For more than a hundred years, the Swiss-Ski umbrella organization has been promoting and supporting a wide range of snow sport disciplines. Performance is also important in administrative matters: budgeting and monitoring are paramount for the various business fields. An unbeatable trio are fresh off the starting blocks, comprising Abacus, Qlik® and Jedox.

Qlik®-Jedox Connector:

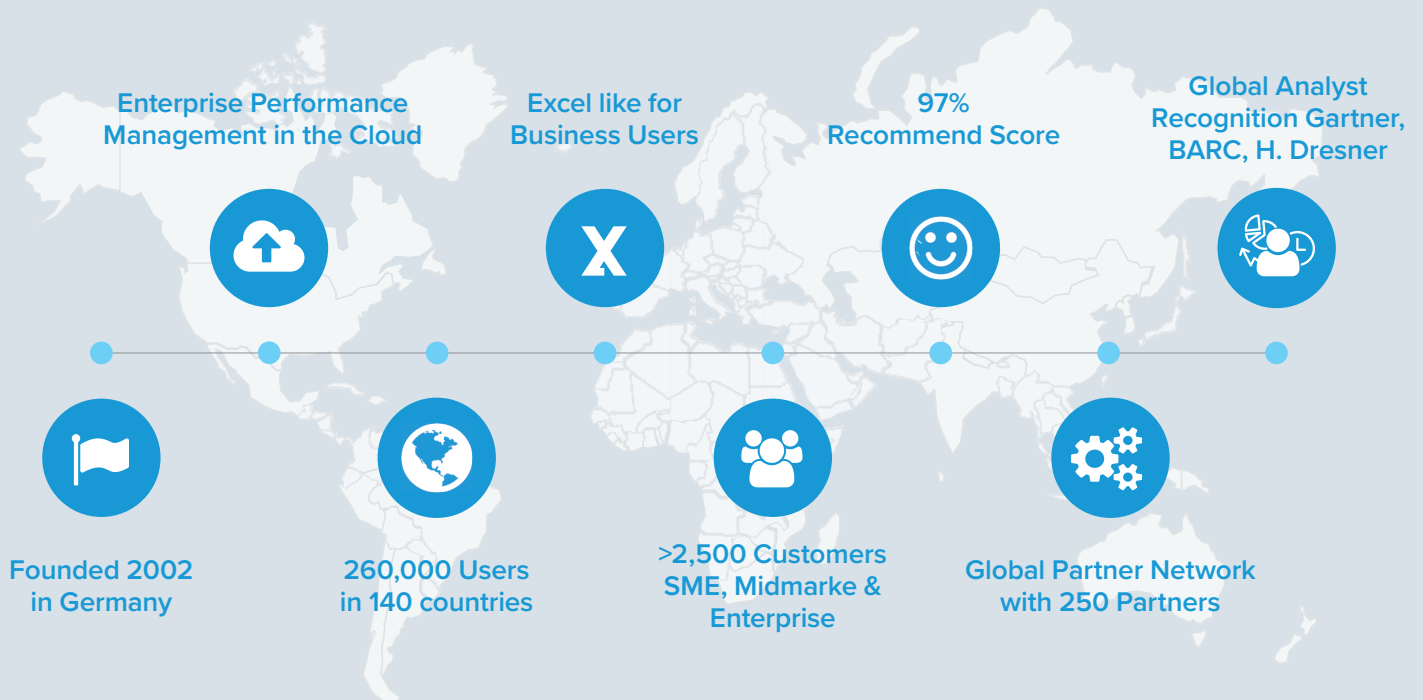
Qlik includes very good data discovery and reporting functions for analysing past data so that companies can understand what happened and why. Jedox seamlessly expands Qlik® by adding high-performance planning and predictive analytics, so that SwissSki can anticipate what might happen and manage their business accordingly.



“As a sports club, we are used to providing services and turning ourselves out in top form. This also includes the internal processes, especially in the financial sector. Together with Azept Business Software and Informattec, we have developed a unique solution for budgeting, monitoring, medium-term planning and calculation. In this way, we gain in efficiency, speed and accuracy.”

Daniel Grossniklaus, Director of Finances and Services, Swiss-Ski

About Jedox



Jedox simplifies planning, analysis, and reporting with one unified and cloud-based software suite. Jedox empowers decision makers and business users across all departments, helping them work smarter, streamline business collaboration, and make insight-based decisions with confidence.

Around 2,500 organizations in over 140 countries use Jedox for real-time planning in the cloud, on the web, and on any device. Founded in 2002, Jedox is a leading provider of Enterprise Performance Management software that incorporates business intelligence in one integrated solution. Locations on four continents and a worldwide network of over 250 business partners underline Jedox's international orientation. Independent analysts recognize Jedox for its leading enterprise planning solutions.

Simplify planning with Jedox and start your free trial today:
www.jedox.com

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