Increased Efficiency with IBM Planning Analytics and ReportWORQ

SUNBELT RENTALS

The Challenge:
Sunbelt Rentals monthly reporting and distribution process was dependent on a laborious, manual, and inconsistent processes in Excel.

The Solution:
IBM's Planning Analytics (PA) and QueBIT's distribution tool, ReportWORQ, were leveraged to build a customized financial reporting model and automate the distribution more than 1300 reports each month.

The Benefit:
Reduced 60 man-hours to less than 10 minutes each month required to distribute all profit center financial statements.

QueBIT®

About the Customer

Sunbelt Rentals is one of the largest equipment rental companies in North America with more than 775 locations throughout the U.S. and Canada, serving the construction, entertainment (sporting events, concerts, movie productions), facilities management, and emergency response industries. Clients range from small independent contractors and consumers to industrial giants. Sunbelt Rentals strives to maintain technical superiority over their competitors.

The Sunbelt Rentals fleet is made up of more than 550,000 units, all of which are available for pick-up or delivery. Yet, their team isn't content to simply rent equipment. With more than 10,000 passionate employees, they're highly focused on delivering productivity solutions, uncompromising customer safety, and continuous innovation.

Addressing the Challenge

Over the years, timely and accurate monthly reporting became a huge challenge for Sunbelt Rentals. The existing solution was heavily Excel-based and Microsoft SQL Server Analysis Services (SSAS) cubes served as the repository for most of the required data sources. Manual intervention was required by the finance team at month-end, to pull in the missing data. Additionally, month-end reporting was often delayed due to data load failures to the SSAS cubes and other performance considerations. Sunbelt needed a tool to replace their Excel-based reporting solution and to streamline data acquisition from their various reporting systems.

Monthly report distribution was also a challenge. At month-end, 6-8 finance team members spent a combined 60 hours generating and distributing performance statements to more than 1,300 managers. Sunbelt needed an automated distribution service to remove manual efforts, ensure accuracy, and enable the finance team to focus on the results of the monthly performance statements, rather than generating them.

"It is vital for our operations management team to have the data they need when they need it to effectively manage their businesses and deliver operational efficiencies. Planning Analytics allows us to deliver timely and accurate financial statements and key financial metric reporting."

-John Schoenberger, SVP of Finance

Why IBM Planning Analytics

QueBIT's solution for Sunbelt Rentals included IBM Planning Analytics (PA), in tandem with ReportWORQ, a QueBIT-built distribution service.

The IBM Planning Analytics platform-based architecture allowed QueBIT to create a solution that is fully customized to Sunbelt Rentals' business needs.

Users now have a single version of the truth for self-service and ad-hoc reporting. The architecture of the system was designed to ensure scalability to accommodate Sunbelt's rapid growth, while laying the groundwork for predictive and planning modules.

The Planning Analytics model is now the foundation of Sunbelt Rental's standard set of monthly reports. By delivering relevant subsets of information tailored to each manager's role in the organization, they are empowered to effectively and intelligently execute their responsibilities with accurate and timely insights.

Why ReportWORQ

Enhancing the overall solution is QueBIT's ReportWORQ. It is a highly customizable, automated report distribution solution enabling both users and non-users of Planning Analytics to receive reports from Planning Analytics. The reports can be delivered in Excel or PDF format to users via email, to a folder on the network, or to SharePoint. Reports are personalized via role based security that ensures people see what they need to without being privy to information they shouldn't.

Given Sunbelt Rental's reporting needs, it was determined ReportWORQ would be the most appropriate tool to solve their report distribution challenge. ReportWORQ was configured to combine multiple reports in a single package customized to each manager in the company, aligning content to a manager's area of responsibility; enabling Sunbelt to develop each report once, but deliver it hundreds of times in contextually relevant versions for each and every user. With ReportWORQ, the report distribution is automated and run on a schedule, but can be run on demand very easily. For example, a profit center manager is focused on the performance of his/her specific location, whereas a district manager needs performance statements for their entire district. Custom report packages are distributed according to each manager's responsibility at the click of a button.

Delivering the Solution

QueBIT delivered a single analytics platform with one version of the truth from a trusted source for Reporting, Analysis and ultimately, Planning and Predictive as well.

Sunbelt Rentals now has financial and operational reports with dynamically updated system data, as well as ad-hoc analysis for power users and have reduced the need for significant IT support. The solution provides:

- Analytics excellence to ensure individuals are aligned to the key goals and initiatives of the organization.
- A long-term solution for Sunbelt Rentals that can support future growth and changing needs.
- A simple reporting distribution process.

Solution Results/Benefits

- Sunbelt Rentals new monthly report distribution process has relieved the finance team of approximately 60 hours of administrative work.
- Distribution via email in PDF Format enables managers on the road to quickly pull up their performance statements on their phone.
- The reports are delivered to upwards of 1,300 managers via email. The same set of reports is also available on TM1Web for managers which provides the options of exporting reports to Excel, conduct ad-hoc analysis and sandboxing and drill-through to General Ledger (GL) transactional data.

Solution Components:

- IBM Planning Analytics 2.0.4
- ReportWORQ

About QueBIT
Trusted experts in analytics, QueBIT is dedicated to helping organizations leverage their data to make more intelligent decisions, that result in significantly improved business value. QueBIT has delivered analytics solutions for more than 450 organizations, including some of the largest and most successful companies in the world. QueBIT solutions span the entire spectrum of analytics, from data management, including Big Data strategy and implementation, Business Intelligence, Business Planning, Predictive Analytics, and IoT Analytics. QueBIT's unique CARE methodology coaches customers to achieve independence in solution ownership while delivering rapid time to value. QueBIT has been recognized with many industry awards. www.quebit.com