



Planning with DeltaMaster – Using standards for customization

Highlights

Bottom-up and top-down planning

Freely definable planning levels

Data input at cell or aggregated level

Proportional distribution of changes in values (splashing)

Multi-tiered cell comments

Authorization concept

Multidimensional real-time evaluation

Offline planning

Plans are an expression of a company's direction. Where are we coming from and where do we want to go? We cannot shape every aspect of the future, but not having a plan means leaving everything to chance – and the competition. Plans provide orientation for a company's actions. They provide benchmarks and are often needed to obtain budgets or win investors. In DeltaMaster, planning is closely interconnected with analysis and reporting. And just as in both of these areas, planning with DeltaMaster is aimed at delegating as many routine tasks as possible to the computer.

Planning in all areas of application

DeltaMaster lets you create applications for data input and correction, especially for planning, mastering data maintenance, and recording operational processes. Our customers use DeltaMaster for planning in a wide range of applications, for example for sales volume, revenue, procurement, budget, and cost center planning. DeltaMaster is also used in industry-specific applications such as campaign and advertising planning in publishing, yield planning in the real estate sector, or collection planning in the fashion industry.

Powerful input functions

DeltaMaster planning uses bottom-up and top-down approaches to simplify data input. For example, data can be input at the cell or aggregated level, and changes in value can be proportionately distributed to child objects using "splashing". Other highlights include value fixing, multi-tiered cell comments, and intelligent cells that "know" how to distribute input correctly.

Planning levels such as budget, actual, best case, worst case, and forecast can be freely defined. Besides, authorizations let you create organizational contexts. The integration of multidimensional real-time evaluation is also possible, allowing you to check for plausibility during data input, estimate the impact on results, and derive actions at an early stage. Applications may use relational and/or multidimensional data storage.

Gross margin planning at Copenrath & Wiese

The food manufacturer uses DeltaMaster for gross margin planning. Among other things, this is based on sales volume and cost data from upstream systems. DeltaMaster can be used to make strategic adjustments to quantities and conditions. The automatic distribution of values and changes in values (splashing) means that the impact on planned contribution margins can be investigated and compared across different versions. "What we like about planning with DeltaMaster is the transparent data structures and the flexible way we can adapt it to our requirements," says Frank Deiters, Head of Controlling at Copenrath & Wiese. "It also eliminates the need to train our planners. The look and feel of the application and its logic are the same as in our reporting system – and we have been using DeltaMaster for this purpose for some time now."



“We have simplified our reporting and reduced our planning costs by half.”

Carlo Bearth, Würth International

Annual planning in Würth’s sales organization

At Würth International, global annual sales planning for the procurement organizations in Switzerland, the USA, and China was migrated from Excel to DeltaMaster in 2007. The four-week project required just ten consultant days. Today, between roughly 10 and 15 project group managers plan the revenues and gross margins for the respective product groups at the country level. Automated consolidation means the respective national currencies are translated into the group currency, the euro, using forecast exchange rates. Also, annual values are automatically apportioned to monthly values so that they can serve as the basis for monthly reporting. “We have simplified our reporting and reduced our planning costs by half,” enthuses Finance and Controlling employee Carlo Bearth.

Pan-European planning standards at Bechtle

Bechtle AG, Germany’s largest independent IT system house, used DeltaMaster to standardize its annual focus and detailed planning – throughout Europe. 130 users at around 100 group companies can now assess the development of the most important key figures at an early stage, such as key income statement items (revenue, sales expenses, distribution expenses, etc.), the contribution margin, EBT, or the employment situation. Planning cycles between the department and management are mapped in scenarios and recorded using a bottom-up approach. For focus planning, around 20 items are entered at an aggregated level. Changes in value are initially distributed across the months on a straight-line basis. Seasonal fluctuations can be taken into account later in the process by fixing cells. DeltaMaster

automatically distributes the changes in child values in such a way that the frozen cells are unaffected. Users can leave cell comments on each income statement item. Detailed income statement planning is developed based on the focus planning. Uli Drautz, Head of Group Controlling, explains: “At Bechtle AG, budget/actual development during the year is continuously mapped in a central report that is provided to the management and the Supervisory Board. This means variances can be identified at an early stage and appropriate countermeasures can be initiated by management.”

Tricky tasks welcome

If required, Bissantz can undertake the entire planning project, from the modeling of planning structures and processes to the generation of proposed values and the automatic provision of user-specific input screens with validation.

DeltaMaster: Software for analysis, planning, and reporting

Common interface for planning, analysis, and reporting

Unique signal concept in red and blue

Efficient planning applications with Graphical Tables

Intuitive user interface

Data input via Windows, web, and app

Patented and multi-award winning: Seven #1 rankings in the BI Survey 2016; rated outstanding in the “Business Benefits” category

Business intelligence with DeltaMaster: Look, see, do.

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