



‘We needed a planning solution that was able to handle large quantities of data and the complexity of our business.’ Janos Venk, VP Group Controlling

Automation, flexibility, and less time spent on planning and reporting were INNIO’s requirements. With its new, integrated planning system, the leading energy solution and service provider quickly improved its planning processes using a highly efficient, connected, simple system with self-service character.



About INNIO

INNIO is a leading energy solution and service provider that empowers industries and communities to make sustainable energy work today. With its product brands Jenbacher and Waukesha and digital platform myPlant, INNIO offers innovative solutions that help industries and communities generate and manage energy sustainably while navigating the fast-changing landscape of traditional and green energy sources.

Facts: INNIO

Foundation:	90+ years ago
Employees:	3,500+ worldwide
IB:	54,000+ delivered engines
Head office:	Jenbach, AT

STATUS QUO

- **Excel-based planning** across all segments & functions
- Aggregated results and drill-through capability to detailed assumptions
- **Sub-optimal response time to changes** in assumptions
- **Time-consuming process to stage or consolidate data** & ensure consistency of assumptions
- **Limits on the level of granularity** due to time required / quantity of data
- **Process prone to manual error** even with numerous cross checks to ensure completeness and accuracy



Janos Venk, VP Group Controlling:

‘To cover our comprehensive integrated business planning (“FP&A”) requirements, it quickly became clear to us that we needed an innovative solution that provides the necessary automation and flexibility that could reduce the time spent on forecasts and planning. Our goal was and is the continuous optimization of the planning processes.’

PROJECT GOALS

- › Create a **consolidated process** that ensured consistency of assumptions used
- › **Improve level of detail** with significantly improved calculation capacity to efficiently manage large quantities of data and complexity
- › Have ability to **set top-down targets and track deviations**
- › Improve ability to **link planning to operational drivers** across the business
- › **Simplify and automate** existing planning logic
- › **Reduce processing time** for planning, forecasts, and reports



Janos Venk, VP Group Controlling:

‘All workstreams of our digitization project were delivered in less than six months of implementation time, including very detailed orders, revenue, cost, and cash flow planning. We are relieved to see that many Excel files are gone, and the level of granularity significantly improved. Reports from the planning tool enable us to efficiently monitor progress and analyze deviations as well as the impact of changes in assumptions. Superusers within Controlling handle day-to-day administration of the tool with limited to no support from IT.’



PROJECT IMPLEMENTATION

- › **Dec. '20:** Shortlist of providers: decision for the provider **smartPM.solutions** based on the solution content and knowledge of the consulting team. CPM technology: **UNIT4 FP&A (prevero)**
- › **Jan. '21 project start:** Training of power users
- › **Timetable and structure** of the step-by-step approach of the implementation process are determined.
- › **Detailed planning and flexible forecasting options** are set out as key project goals. Several streams (orders equipment and services as well as maintenance contracts, incoming orders, and sales) are covered gradually at INNIO.
- › **High engagement of power users throughout the implementation phase.**
- › **Jun.-Nov. '21: Trial run for 6+6 planning cycle** – subsequent to which the 9+15 also was executed.
- › **Jan.-Mar. '22: Performance optimization / process simplification / master data cleanup** to ensure further improved operational performance.



Janos Venk, VP Group Controlling:

'INNIO chose smartPM.solutions as the technology and implementation provider because it had the expected solution flexibility and automation. Even during our first conversations, it felt like we were talking the same language. smartPM was always available for us and responded quickly to requests during the testing and planning phase.'

UNIT4 FP&A | INNIO Planning Work...

INNIO Planning Workflow

Scenario:

Area	Responsible	Status	last change by	last change on			
SG&A							
SG&A - INNIO Regions	John Doe	Approved	John Doe	17.02.22 10:50	Submitted	Approved	Reject
SG&A - INNIO Global Service Excellence	John Doe	Submitted	John Doe	21.03.22 09:19	Submitted	Approved	Reject
SG&A - INNIO Global Sales Support	John Doe	Awaiting correction	John Doe	17.02.22 11:02	Submit	Approve	Rejected
SG&A - INNIO Sales Controlling		Not Started			Submit	Approve	Reject
SG&A - INNIO Project Management		Not Started			Submit	Approve	Reject
Orders							
Orders - Jenbacher Equipment		Not Started			Submit	Approve	Reject
Orders - Jenbacher Service		Not Started			Submit	Approve	Reject
Orders - Waukesha Equipment		Not Started			Submit	Approve	Reject
Orders - Waukesha Service		Not Started			Submit	Approve	Reject
Revenue							
Revenue - Jenbacher Equipment							
Revenue JE - INNIO		Submitted	John Doe	22.04.21 11:04	Submitted	Approve	Reject
Revenue JE - Energas		Submitted	John Doe	22.04.21 11:04	Submitted	Approve	Reject
Revenue JE - ECI		Awaiting correction	John Doe	22.04.21 12:18	Submit	Approve	Rejected
Revenue - Jenbacher Service		Not Started			Submit	Approve	Reject
Revenue - Waukesha Equipment		Not Started			Submit	Approve	Reject
Revenue - Waukesha Service		Not Started			Submit	Approve	Reject
Programs		Not Started			Submit	Approve	Reject
COGS & OVC							
COGS - Jenbacher Equipment		Submitted		19.04.21 14:28	Submitted	Approve	Reject
COGS - Jenbacher Service		Not Started			Submit	Approve	Reject
COGS - Waukesha Equipment		Submitted		19.04.21 14:26	Submitted	Approve	Reject
COGS - Waukesha Service		Submitted		20.04.21 15:27	Submitted	Approve	Reject
O&E		Not Started			Submit	Approve	Reject
Balance Sheet / Cashflow							
Inventory		Not Started			Submit	Approve	Reject
Accounts Payable		Not Started			Submit	Approve	Reject
Accounts Receivable		Not Started			Submit	Approve	Reject
Progress Collections		Not Started			Submit	Approve	Reject
Other Working Capital		Not Started			Submit	Approve	Reject
CAPEX		Not Started			Submit	Approve	Reject
Cashflow from Financing Activities		Not Started			Submit	Approve	Reject

Figure 1: Planning workflow INNIO Jenbacher – example dashboard

SUMMARY & LEARNINGS

- > Flexible, automated planning and reporting in one system
- > Time savings in planning and reporting

- › **Simple and efficient collaboration of all relevant departments**
- › **Focus on important, value-adding FP&A activities**
- › **Increased data reliability and transparency**
- › The Unit4 FP&A (prevero) technology platform offers almost limitless planning possibilities and simplifies daily work immensely.
- › **Knowledge transfer from very experienced consultants to power users** helps with process improvements.
- › **Employee satisfaction increases with the self-service approach;** no support from IT or external experts is required.
- › **No 'idle' mode: Continuous optimization of processes**



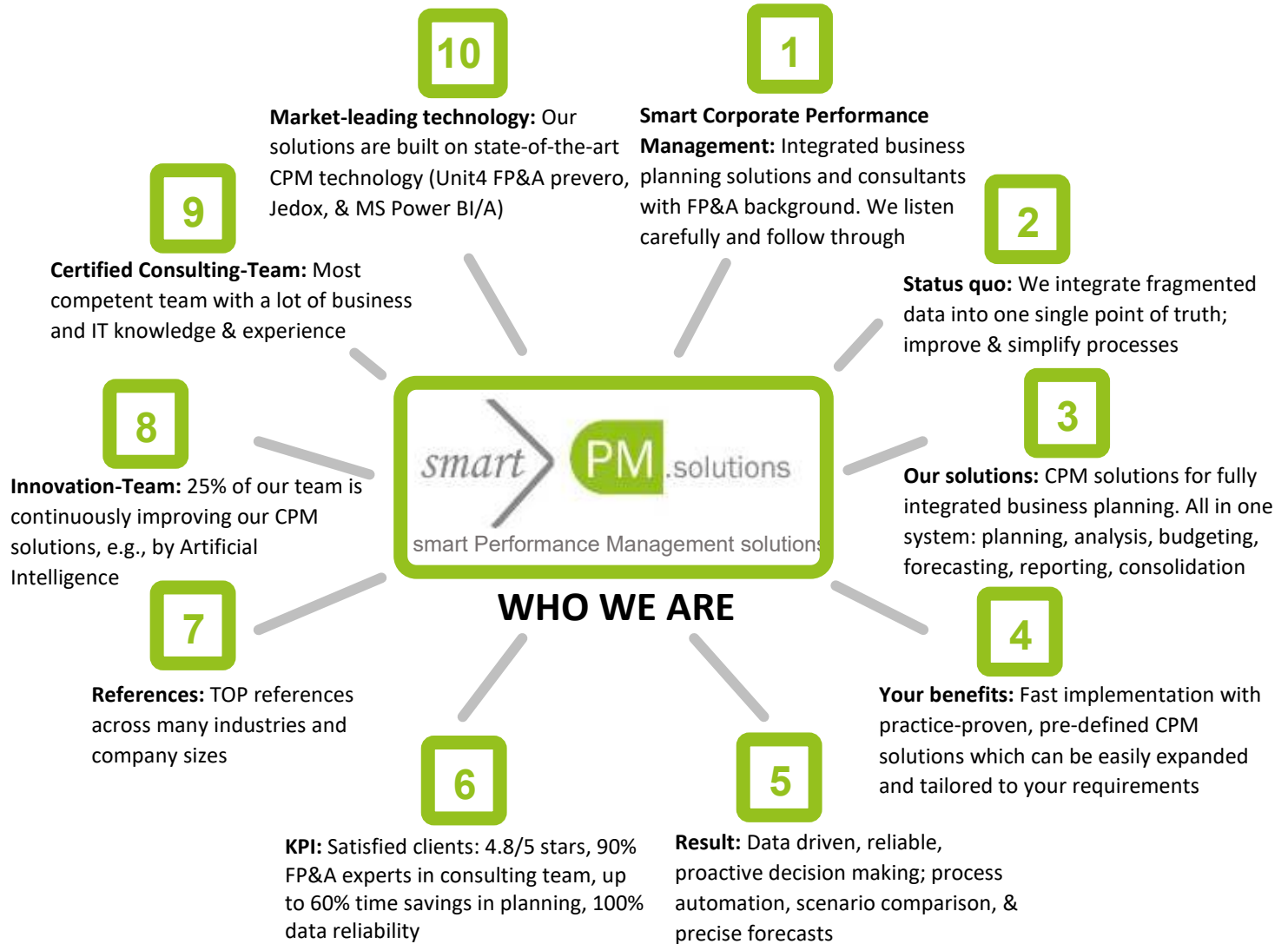
Janos Venk, VP Group Controlling:

'The tool is very flexible for users to define / implement requirements. During the implementation we took the opportunity to optimize the existing planning process and adapt to the greater granularity that the tool enabled. We are very satisfied with our solution and the consulting from smartPM.solutions and would approach a project like this in the same way again.'



[Integrated Planning WHITEPAPER DOWNLOAD:](#)





smartPM product family: grow with your needs – step by step



Do you have further questions?

We are looking forward to an expert talk with you!

Simply book a meeting in our [online calendar >>](#)