



# Case Study: How A Packaged Food Company utilizes SAP Analytics Cloud to drive and track Project Savings

Beth McBreen, February 2022

## Company Overview

This customer is located in California, U.S.A. and is part of the Fruit and Vegetable Preserving and Specialty Food Manufacturing Industry. It has 1,000 employees across all of its locations and generates \$250 million in sales (USD). This packaged food company is a strategic business unit of a much larger Company's successful portfolio.



## Project Goals an Overview

This Packaged Food Company has an extensive monthly forecast process to account for savings across the company. These costs could be related to cost of goods savings or to SGA savings, but finance and project leaders worldwide provide monthly guidance on projected savings to the company. This forecast is then incorporated with the overall financial forecast. To accomplish this forecast, The Company was using a very manual process Excel spreadsheets to capture project level detail by period. It was difficult to consolidate the savings as all fields were free form without controls around unique identifiers (such as a key or ID).

While partnering with SimpleFi, The Company was able to produce a streamlined and more automated process for their forecasted savings. By leveraging SAC's analytic designer, The Company created a process by which new project IDs were autogenerated. The designer also allowed for a controlled environment while creating new projects and their associated attributes (vs. free form text). Finally, The Company took advantage of the workflow functionality that SAC offers to create a seamless submission and approval process.

## Project Scope

The following was included in the business process scope of the implementation:

- Planning model
  - Dimensions are manually maintained
  - Application designer button allows for automatic changes of dimension properties from the planning story
- Analytic Application
  - Custom story to accommodate very specific set of requirements for the savings forecast
    - Autogenerated Project IDs
    - Description pop-ups for guided user experience
    - New project buttons with guided directions
    - Incorporation of Data Actions
    - Standard story functionality for forecast inputs
- Data Actions and Calculations
  - New project calculations to separate out the savings period from the recognized savings on the PL period (lag calculations)
  - Risk adjustments to calculate likelihood levels by project
  - Calculations to allow for YTD calculations due to 13 period year at Dole
- Reporting
  - 2 general reporting / dashboard views
- Workflow / Calendar Tasks
  - Utilize composite task functionality to automate the submission process

## Project Challenges

A key challenge in the project was the limited functionality available in SAC for flexible time periods. Currently SAC allows for only a 12 period time dimension (2022 scheduled release). This limits on data actions and calculations how we can use time based keywords, and instead have to create custom properties.

## Project Wins

Several wins have been realized because of the SAP Analytics Cloud implementation.

- Enhanced data integrity and reported results utilizing SAC vs. Excel.
- Defined controls on project savings updates, changes, and new projects.
- Simplified process of consolidating all regional project savings
- Transparency into previously offline processes
- Transparent version control where users can access versions for comparison

## Future Use

This Packaged Food Company is exploring solutions for enterprise-wide planning, that would include end to end planning capabilities.



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318 W Adams St, Suite 1604  
Chicago, IL 60606

[Contact@SimpleFiSolutions.com](mailto:Contact@SimpleFiSolutions.com)  
1-800-985-9430

4388, rue St Denis, Suite 200 #410  
Montréal, Qc H2J 2L1  
Canada