SIMPLEFI

Case Study: Sales, Royalties and Financial Planning using SAP Analytics Cloud on SAGE, Dynamics and Salesforce

Company Overview

www.mtygroup.com

MTY Group franchises and operates quick-service, fast casual and casual dining restaurants under more than 90 different banners in Canada, the US and Internationally. Based in Montreal, MTY is a family whose heart beats to the rhythm of its brands, the very soul of its multi-branded strategy. For over 40 years, it has been increasing its presence by delivering new concepts of restaurants, making acquisitions, and forging strategic alliances, which have allowed it to reach new heights year after year. By combining new trends with operational know-how, the brands forming the MTY Group now touch the lives of millions of people every year. With over 7000 locations, the many flavours of the MTY Group hold the key to responding to the different tastes and needs of today's consumers as well as those of tomorrow.

GROUPE MTY GROUP

Project Goals and Overview

MTY was looking to modernize their ERP landscape that had grown exponentially through various acquisitions resulting in over 60 distinct ERP systems, the majority being on SAGE. In parallel, the annual (excel-based) budget process had become unmanageable and had to be optimized for the next budget cycle which was only 4 months away. SimpleFi'S pre-packaged content on SAP Analytics Cloud brought the ideal level of standardized process combined with flexibility to reach that objective.

An S4 roll-out was also in the works, but would take years to complete, so SAP Analytics Cloud had to be a complete planning and analytics solution by itself that could transition to S4 as it's main source in the future.

Project Scope

Financial Reporting

The following items were included in scope to support the monthly reporting package:

- Development of 5 standard reports in replacement of existing PowerBI package
- Brand-level security

Project Scope

Budgeting Process

The following items were included for the budgeting process:

- Budgeting templates for system sales forecasts (Franchisee and Corporate locations)
- Budgeting template for Royalties calculations (Franchisee)
- Budgeting Templates for cost planning (corporate)
- Budgeting template for P&L by Brand (Franchisees) and Location (Corporate)
- Budgeting Templates for workforce planning
- Allocations rules for HR costs to Brands/Locations
- Advanced formulas to feed location-based forecasts to P&L accounts, automated costs breakdown for each locations, seed initial version from actuals, manage openings and closures
- Support process involving over 200 planning users

Project Challenges

The two main challenges we encountered were around the integration of 60+ source ERPs and also the fact that some people would plan just a few numbers once a year which did not justify the purchase of planning licenses.

In order to simplify the integration of so many different ERPS, each with their distinct chart of account, we used a separate SQL database that already contained standardized mapping between local chart of accounts and corporate chart of accounts. Also, through the use of Advanced Formulas, we were able to allow local planners to plan on their chart of accounts and then consolidate the result on the corporate structure.

As for the licensing, we defined a process that allowed plan owners to manage non-planning users so they can enter their forecast in the system without the need of a planning licence while being compliant with licensing rules.

Project Wins

- From a Project Management perspective, the project was completed On Time and On Budget
- One source of truth throughout the planning cycle combining Actuals and Budget together
- Future-ready solution when MTY will be standardized on one ERP system. At which point additional planning and reporting areas will be rolled out to future enhance their FP&A

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SIMPLEFI

318 W Adams St, Suite 1604
Chicago, IL 60606

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

Contact@SimpleFiSolutions.com
1-800-985-9430