

# Telecom Company

## Defining a performance management blueprint



### Industry:

Telecommunications

### Geography:

US headquartered

Global operations

### Captavo Services:

Enterprise Performance  
Management Blueprint

### Benefits of using Captavo:

Captavo's understanding of best  
practice EPM

Established a clear plan of action  
with deliverables

Senior management validated and  
approved the plans

Positive impact process change

"Captavo's experience was  
essential for us... we now have a  
clear plan of action that will deliver  
distinct business benefit."

### Business background

Our client is known as one of  
largest leading  
telecommunication company  
services. Over five years, our client  
has built up a significant Telecoms  
business, which already contributes  
half of the Group's revenue and is set  
to be a major driver of future  
profitable growth.

### Processes and systems need to be updated for growth

It was becoming increasingly difficult  
for the client's finance and business  
development team to be effective. At  
the heart of the problem lay the  
client's processes and legacy systems  
which were having to maintain an  
organization twice the size of that for  
which they were originally designed.  
New products, increased volumes  
and market pressures made our  
client realize that in order to  
effectively manage the business, the  
existing way of doing things would  
need to change. This change needed  
to be built around an integrated  
Enterprise Performance  
Management (EPM) framework that  
would encompass radical changes to  
existing systems, processes and  
people.

### The challenge is identifying what needs to change

The client wanted to understand  
what needed to change and how to go  
about making those changes in order  
of priority. The organization was  
rapidly expanding, and through  
several acquisitions, now had a  
diverse range of systems and  
processes. It was in this environment  
of change that our client asked us to  
help define a EPM Blueprint,  
roadmap and business case for  
change. In order to conduct the  
review, Captavo split the exercise  
into three distinct areas:

#### Area 1 – Statutory and Management Reporting

As part of this process Captavo  
reviewed the current system and  
processes for group reporting. This  
included reviewing the current data  
structure, reporting requirements  
and processes.

#### Area 2 – Planning, Budgeting and Forecasting

Captavo analyzed the way strategic  
planning, budgeting and forecasting  
was conducted across the client. In  
addition to reviewing the systems  
and processes, Captavo also looked  
at the reward mechanism around  
the process.

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### Area 3 – Meta Data

Captavo also reviewed the types and variations of meta data that were being used within the process. This included reviewing the existing chart of accounts and processes for supporting its day to day maintenance.

### Captavo's Findings

The client had already selected Oracle Hyperion as their EPM provider of choice. As a result, we were able to articulate a three year EPM Blueprint which outlined the following:

- An 'end game' EPM vision outlining an integrated system and process framework for budgeting and planning, Group and Management Reporting and Master Data Management
- A phased implementation plan, breaking the Blueprint into eight distinct projects phased over three years
- A complete business case for each project and phase. This articulated the cost, benefit and required resource profile for each work stream

"We selected Captavo as our business partner to provide guidance, support and expertise for our EPM Roadmap. Their quality of business skills and in-depth product knowledge continue to provide us with complete confidence that we will be successful in this project."

### Captavo's

**recommendations** As part of the Blueprint, the following were recommended:

- Implementation of a standardized Chart of Accounts across the organization
- Replacement of Hyperion Enterprise with Hyperion Financial Management
- Connecting strategic planning to operational planning through the implementation of a standardized planning model
- Phased implementation of Hyperion Planning including divisional planning models rolling up to a standardized group model
- Implementation of a standardized forecasting process across the group
- Implementation of systems and processes to support master data management

### The next steps

The Blueprint was internally validated before the business case was approved. Captavo are now assisting the client on implementing Phase One of the plan.