

# Fiat forecasting 10x faster with unified Jedox solution

## Fiat unifies people and planning for a winning advantage



*“The efficiency increase in planning alone is very impressive! What took several hours before we now achieve within seconds.”*

Richard S., Head of Controlling,  
FCA Motor Village Germany

### Building the future

With sales of 86 billion euros in 2013 and 472 subsidiaries, Fiat is much more than an innovative carmaker. Fiat develops utility vehicles, production facilities and industrial robots.

The leading automotive manufacturer employs more than 225,000 people worldwide and manages 16 brands, among them Alfa Romeo, Lancia, and Jeep.

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#### Customer

FCA Motor Village Germany | Germany

#### Industry

Automotive, Retail & Distribution

#### Department

Finance, Sales, Management

#### Solution

Unified planning & reporting solution with P&L, KPIs, budgeting, forecast, local planning across dealerships

#### System environment

Freicon FILACS.PLUS Dealer Management System,  
Sage 200 FiBu, Excel, Oracle Hyperion

## Static reporting and planning put the brakes on progress

### Challenge

- ▶ Excess hours due to separate systems for reporting and planning
- ▶ Previous solution unable to model complex calculation logic
- ▶ Cumbersome planning process in Excel sheets
- ▶ Inflexible solution requiring manual adjustment of single plan data
- ▶ Unsatisfying performance and system crashes caused by large Excel files

Fiat Germany provides tailored sales and automotive services through its motor villages, managing direct sales, business customers and partners, and maintenance and repair. Central financial controlling relied on legacy reporting and Excel to report and plan quarterly forecasts for the European headquarters.

Richard S., Head of Controlling at Fiat, soon discovered flaws in the legacy system. Plan data took a detour through static Excel sheets before being uploaded. Updates of crucial forecast information and required excessive manual work, increasing the risk of human error. The system could not model the complex calculation logic for the corporate planning and the P&L. Richard explains:

“The solution generated substantial excess expenditure for our dealerships, who were consolidating their data under considerable time pressure. Night shifts for the quarterly forecasts had become the rule rather than the exception.”

Fiat also saw potential to optimize their planning. Dispersed plan data meant Excel hell, with data in 30 different spreadsheets, with each one needing adjustment and manual consolidation for every minor change. Fiat was losing time gathering and reconciling data, and couldn't support fact-based decision making. The data cycle between HQ and the planners in Fiat subsidiaries tied up valuable resources, with expenditure rising monthly in an effort to complete planning in time. Richard adds:

“During the multi-level planning process, errors in the complex Excel sheets were inevitable, and amending them consumed even more precious time.”

## Unified planning and reporting across Europe

To respond with more agility to HQ's evolving forecast requirements and to facilitate and accelerate data consolidation and preparation for all 15 subsidiaries, Fiat needed a modern reporting solution with advanced planning functionality. The new solution needed minimal administration, with business users able to adjust reports and planning logic quickly and independently.

Jedox's proof-of-concept workshop convinced Fiat with the intuitive Excel-like user interface, ensuring employees would take to the solution with ease. Automated connection to Fiat's IT infrastructure and the powerful analytical engine enabled real-time reporting. Richard:

“We understood that our planning and reporting had to become agile to keep up with modern business processes and Jedox turned out to be the perfect management tool for this purpose.”

### Solution

- ▶ Unified solution for reporting, analysis, and planning for 15 dealerships
- ▶ 60 users in controlling, subsidiaries, and management
- ▶ Web plan entry by power users
- ▶ Top-down, bottom-up and reverse planning

## Cost-saving implementation and rapid knowledge transfer

Jedox's self-service approach and rapid knowledge transfer ensured fast implementation and immediate results. Fiat and Jedox defined the project requirements and completed complex project requirements as a team. It was important for business users at Fiat to be empowered to manage their solution independently. Hands-on practical training from Jedox Academy enabled Fiat's Controlling department to own their solution, minimizing external consulting costs.

Implementation needed just a few staff and virtually zero IT support, with Controlling able to set up all reports and user permissions itself. Jedox's user-friendly file manager also made work easier, explains Richard:

“Jedox's Excel-like interface makes it easy to create reports with just a few clicks. You do not need to be an IT expert in order to work with Jedox, your Excel knowledge will get you on your own.”

Following successful implementation, Controlling administers only when needed, without a dedicated administrator.

## Enterprise planning and reporting from one source of truth

### Planning dimensions

- ▶ Sales
  - new cars
  - used cars
  - garage
  - spare parts
- ▶ HR
- ▶ Administration
- ▶ P&L with various cost types

Fiat uses Jedox for streamlined top-down, bottom-up planning. Fiat now has daily visibility actual vs plan KPIs on budget, quarterly forecasts, monthly budget–actual comparisons and weekly forecast calls with HQ. 60 users at Fiat across diverse departments access high-quality data in one consistent environment.

Central managers enter plan data for sales, staff, and administration independently, and write-back instantly to the unified Jedox model.

Richard explains Jedox's advanced planning:

“What took several hours before can now be achieved in seconds. Jedox calculates and consolidates data the moment it is entered, and my team starts on crucial evaluations immediately, unburdening the entire organization.”

Actual–plan comparisons and planning history are available with just one click.

### Advantages

- ▶ Local planning input frees Controlling without burdening IT
- ▶ Less than one FTE for administration
- ▶ Easy integration with the Fiat system environment

### Why Jedox?

- ▶ Unified planning, analysis, and reporting
- ▶ Self-service empowerment and independence
- ▶ Ease to use with Excel PLUS intuitiveness
- ▶ Easily scalable to international subsidiaries

## Daily automated reports straight to HQ

Jedox has optimized reporting at Fiat and visualizes insights. Instead of sending spreadsheets, controllers submit their weekly forecast reports to HQ through an upstream connection with Hyperion. Reports are automatically sent to specified recipients on a weekly basis, with Jedox providing daily real-time data:

“With Jedox, not only our planning but also the analysis of the data and complex queries are 10 times faster than before.”

## International roll-out

Jedox user acceptance has made life considerably easier for Richard and his Controlling team, with Fiat’s planning team also impressed:

“Feedback is positive throughout, because Jedox is easy to handle and use through its intuitiveness.”

Fiat will add more dashboards and visualizations and increase mobile use on tablets and smartphones. Fiat’s successful German implementation has piqued interest across Europe, with plans to roll Jedox out to Austria and Switzerland.

Richard recommends Jedox to his colleagues:

“The efficiency increase in planning alone is very impressive! Our daily work has been made significantly easier and I see great further potential for our company with Jedox.”

Contact: [Jedox AG](#)

web: [jedox.com](#)  
mail: [info@jedox.com](mailto:info@jedox.com)  
blog: [jedox.com/en/blog](#)