



OPTIMA packaging group

Unit4 Prevero delivers a single point of truth with excellent data reliability and quality, enabling OPTIMA to undertake integrated corporate and financial planning across 40 companies.

Customer: OPTIMA packaging group GmbH
Size: 2,250 employees
Sector/industry: Machine construction
Unit4 Prevero solution: Integrated Business and Financial Planning

What do shower gel, dental care products, spices, baby powder, kitchen towels, cotton pads, canned soups, hairspray and headache pills have in common? Well, before arriving in stores, all of these items go through packaging machines and filling lines, which are manufactured to cater for a wide range of differing products and ingredients.

OPTIMA packaging group GmbH, headquartered in Schwäbisch Hall (Germany), produces packaging machines and filling lines for the pharmaceutical industry as well as the consumer, non-woven and life science sectors. Approximately 40 international operating companies, based in 14 countries, offer an almost infinite variety of products in different quantities. For example, OPTIMA undertakes aseptic filling and produces food packaging machines, portion packs and cardboard boxes as well as packaging products for home, personal and infant care. With such diversity, it's quite obvious that, integrated financial and business planning as well as budgeting can be a real challenge.

“Our lives have become much easier”

Tobias Schaffitzel, Head of Group Controlling at OPTIMA packaging group, says: “For many years, we planned, budgeted and managed our key figures with Winterheller’s professional planner, which was acquired by Prevero in 2011. However, our world became more complex, a major update was required and the software was no longer flexible enough for our needs.” As a result, OPTIMA decided to replace its previous product with



Unit4 Prevero, which offers group-wide Business Intelligence (BI) and Corporate Performance Management (CPM) capabilities. Tobias says: “We switched because we immediately saw that our life would be much easier with Unit4 Prevero. Indeed, we simply prepare the planning for each of our 40 companies, after which the result is automatically consolidated

and then consolidated again for management purposes.” In the past, the information came from the individual countries and was then implemented centrally. This was quite complicated and the automatic import did not work properly. Now the situation has changed. “Data is imported directly from SAP into Unit4 Prevero without any problems.”

Going live after only 6 months

The roll out of Unit4 Prevero was very straightforward as Tobias explained “We completely redesigned our planning logic. We could implement our basic planning ideas and customize the logics readily. All of this was accomplished in close cooperation with the Unit4 Prevero team. As a result, we were able to go live on the new solution after only 6 months. Today we are working with about 30 users worldwide, with at least 1 user in each of our locations.” This offers a significant advantage to OPTIMA; Unit4 Prevero is delivered as a web-based solution meaning that remote workers can access and input into the system on a daily basis.

Significant increase in productivity

According to Tobias, the advantages over the previous system can be observed in many areas, for example in balance sheet planning. In the past, individual items such as receivables, payables, inventories, etc., were recorded manually and then entered into the balance sheet. Today references can be created

and designed using data cubes. *“As sales increase, so does the advance payment. If there is an increased inventory change, the inventories in the balance sheet also increase automatically. None of this was possible before – we had to enter everything manually and check it several times. Now that fixed logics have been defined, however, the calculations are largely carried out automatically. Therefore, overall productivity has increased considerably.”*

“We replaced Excel with real data integration”

There has also been a lot of progress in terms of allocations. As a large number of companies are affiliated to OPTIMA packaging group, cost allocations are of particular importance. Previously, they were recorded externally and entered manually in the expense account. In the Unit4 Prevero allocation manager, the allocation logics are designed to allow unlimited allocations and to generate keys automatically. *“We replaced Excel with real data integration,” explains Tobias. „Another advantage is that the views in the data cubes immediately show where the software has intervened, and made changes, which is very convenient for us.”*

Next step: performance measurement

Are there any plans to extend the new solution to other areas of application? Tobias says: *“Absolutely. Performance measurement is our next big project. Our aim is to shed light on certain high-performance processes. We would like to take a step away from the traditional revenue analysis according to the German Commercial Code (HGB) and move towards pro forma revenues, which we want to represent with Unit4 Prevero.”* This opens up new perspectives, for example, how many employees in the construction department generate a specific amount in terms of pro forma sales and how many employees do we need to achieve a turnover of 1 million Euros?

Another advantage is that documents accompanying all processes can be included in the software. *“We write down assumptions for every planning process we undertake. Up to now, we used to have these in Word and store them separately on our network. Today, the import from the SAP system works perfectly and we can integrate these documents directly into the database. As a result, we can imagine using this as an ex-tended BI tool now and later as a management cockpit.”*

“The application has literally been written for us”

Tobias concludes: *“In general, the acceptance of the Unit4 Prevero solution is very high among our employees. The application has literally been written for us and everyone can find their way around it perfectly. The calculation logics are designed to ensure that calculations only take place when they are initiated proactively.”* This means that it is no longer possible for the system to work in the background and to accidentally “swallow” data without anyone noticing. This provides a great deal of security.

“Unit4 Prevero is our single source of truth”

Tobias wants to highlight two very important issues: *“Firstly, we save an enormous amount of time. One of the reasons for this is that we can make last-minute changes ourselves, even when sales planning is well underway, and without having to redesign the entire planning structure. And secondly, data security and quality have improved significantly. All our data is in one place and only the data stored in the system counts when it comes to planning; Unit4 Prevero is our single point of truth.”*



About Unit4

Unit4 is a leading provider of enterprise applications empowering people in service organizations. With annual revenue of over 500M Euro and more than 3000 employees worldwide, Unit4 delivers ERP, industry-focused and best-in-class applications. Thousands of organizations from sectors including professional services, public services, not-for-profit, real estate, wholesale, financial services and education benefit from Unit4 solutions.

Unit4 is in business for people

unit4.com

Unit4

Papendorpseweg 100
3528 BJ Utrecht,
The Netherlands

T +31 88 247 1777

E info.group@unit4.com

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