BERTELSMANN
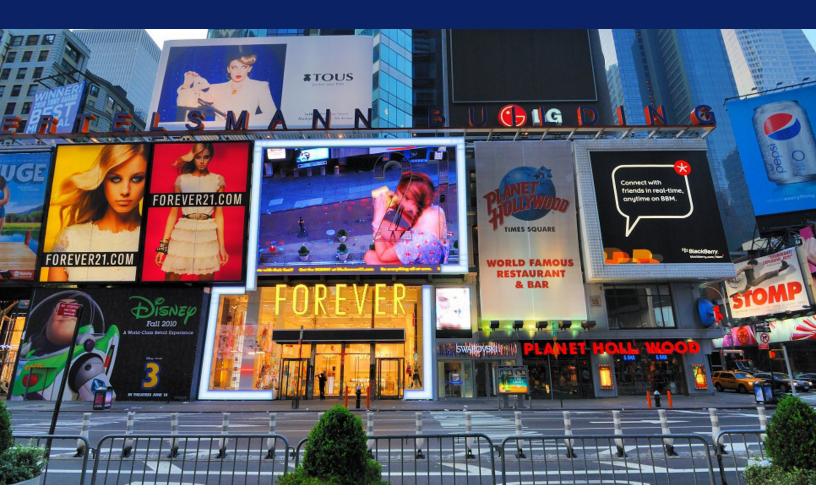
Digitalization of Bertelsmann Group's management reporting

Bertelsmann's Arvato division has been using Anaplan XL Reporting for self-service reporting and analysis for over a decade. The flexibility and ease of use of the solution has led to Anaplan becoming a central component of general management reporting at the Group level.

Anaplan

Bertelsmann

Industry:
Media, services, and education

Size:
145,000 employees

Location:
50 countries worldwide

Sales:
€18.7 billion in 2021

The challenge

Bertelsmann's central Group reporting team needed fast, simple, and flexible access to an extensive range of financial data. The department also needed full control over the way standard reports were designed — including complex formatting and layout requirements — without having to depend on internal or external IT resources. As the team explored its software options, they also recognized the need to manage ad-hoc reporting requests, and to support users who wanted to conduct more comprehensive analysis. Bertelsmann uses Microsoft Analysis Services technology to generate a data model from the SAP BFC Consolidation platform which is optimized for the finance department's reporting requirements. The combination of a rich data model with powerful reporting and analysis functions was crucial for success.

The solution

Anaplan XL Reporting offered the ideal solution, thanks to its extended range of functions that simplify report development. XL Reporting's add-in for Microsoft Excel allows Bertelsmann's business users to leverage their existing knowledge of a familiar tool and to connect directly to the Analysis Services platform. This minimized the learning curve as the Bertelsmann team transitioned to advanced reporting and led to a high level of adoption. Just as importantly, using XL Reporting eliminated the risk of having Bertelsmann rely on Excel for data storage.

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> **Anaplan XL Reporting gives us the flexibility that we need to efficiently implement the ever-evolving requirements of our financial reporting."**
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> **Senior Director, Business Intelligence**

Anaplan XL Reporting has become the central management reporting tool in Bertelsmann Group reporting. It has grown with the requirements of the company and has helped to create added value in terms of quality and speed of reporting.

Looking to the future, Anaplan XL Reporting connectivity to Azure Analysis Services, Power BI data, and the Azure Web App gives Bertelsmann choice and flexibility in terms of any architectural changes to come.

The results

Bertelsmann's success with the initial group of 30 Anaplan XL Reporting users has led to the software now being deployed in a range of other areas across the business.

In fact, Anaplan XL Reporting is now used by almost 300 staff for a wide range of financial reports. These include monthly statements, planning and forecast data, as well as business-specific operational and customer analysis.

The Anaplan XL portal is used to provide a fully customized view for different audiences. Each audience has tailor-made views on the data which interests them most. One group of power users creates and publishes these reports for the wider audience. This coordinated approach ensures the quality and consistency of the reports. Any user can also access the reports at any time by means of a web browser. Anaplan XL Reporting's scheduling service helps automate report distribution using Excel, PDF, or PowerPoint files.

Finally, the Anaplan XL Reporting app enables access from mobile devices, and reports can be fully responsive to enable meaningful use of live data on the go.

Evolving business needs

Anaplan XL Reporting's continuous development and widening product scope has proven to be extremely important for Bertelsmann as requirements have evolved over time. The IBCS-certified charts helped implement a reporting style that aligned with Bertelsmann's corporate standards. Bertelsmann was also able to count on XL Reporting's SSO layer for the introduction of Okta to simplify authentication in a complex, multi-system environment.

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