

Modern planning processes and

flexibility in operational management



Topics: integrated financial planning, systems integration

Sector: financial services

Turnover: € 642 m

Employees: 1,800 plus 1,900 independent financial advisors

Users: 100

Pre-systems: SAP R/3 FI & CO and SAP BW

Project duration: 10 months

Implementation: CP Corporate Planning AG



"The import function is perfect for connecting our data from other systems. Thanks to the flexibility of the structure, it's easy to depict changes in our business model or the business environment."

Benno Günther, Head of Controlling, MLP Finanzberatung SE

Three questions for Benno Günther

What was your starting point?

We planned each of our inputs, such as value drivers and interest, in different Excel solutions, and then transferred the figures to what was just a payment tracking tool. The required output, such as the budgeted balance sheet and cash flow plan, as well as the budgeted P&L, was generated in yet more Excel solutions. We were looking for a single tool in which to plan the P&L, balance sheet and cash flow. We also needed to depict several consolidated reporting entities.

What were the highlights?

The main highlight for us was the excellent import function – perfect for connecting our data from SAP. It's amazing how quickly the solution lets us respond to changes. Having already set up a new business segment, we could depict it in the tool even while it was being implemented. The straightforward and frank communication with the CP Consultants during the implementation was absolutely first-rate. We were also glad to have the project completed on time and within budget.

What lessons have you learned?

The coaching method worked well for us, the consultants rapidly getting us sufficiently up to speed to use the tool unassisted. I'd advise putting project objectives in precise terms. We also gained a lot from having two project managers so that we could multiply our know-how and avoid staff shortages. Detailed project planning, including milestones, and continuous tracking of the project status are no less essential.

About MLP Finanzberatung SE

The financial services company, a subsidiary of MLP SE, acts as an agent for selling financial products such as insurance policies, capital investments and loans. Its target groups are professionals and discerning private clients.

Would you like to know more?

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CP Corporate Planning AG

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