



### Business challenge

With multiple BWG Foods depots sending goods to stores across its network, the company found that budgeting and sales reporting processes had become increasingly complex. How could it streamline these processes?

### Transformation

Working with IBM Business Partner ProStrategy, BWG Foods upgraded the technology supporting its analytics activities with IBM® Planning Analytics—delivering faster, simpler, more accurate reports.

#### Business benefits:

**Frees up 240**  
hours of analysts' time,  
enabling them to focus on  
value-add tasks

**Eliminates**  
dependency on individuals  
with detailed application  
knowledge

**Automates**  
weekly and monthly sales  
analytics, accelerating  
insight

## BWG Foods Simplifies and streamlines group-level reporting to drive business growth

BWG Foods UC is part of BWG Group, a leading retail and wholesale distribution company operating in the Republic of Ireland and the United Kingdom. BWG owns and operates a number of leading retail brands with over 1,400 SPAR, EUROSPAR, MACE, Londis and XL stores serving local communities in partnership with independent retailers. BWG also owns and operates leading Irish wholesale brands BWG Foodservice and Value Centre Cash & Carry. BWG Group has an estimated 12% share of the overall grocery retail market in Ireland, and a 40% share of the convenience retailing market.

*"Thanks to IBM Planning Analytics, we have saved more than 240 hours on the budgeting process and over eight hours a week on sales reporting."*

Tim O'Leary  
MIS Manager  
BWG Foods



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## Building a comprehensive view of sales performance

When you run a network of multi-symbol convenience stores, keeping track of the sales performance of each store and generating accurate annual budgets can become difficult as the business grows. Without a convenient way to analyze financial data, you risk overlooking valuable insight that could drive strategic decision-making.

BWG Foods, one of Ireland's leading food retail and wholesale companies, operates a variety of convenience stores in Ireland and South West England, including Londis, MACE, SPAR and EUROSPAR. As the company introduced more stores into its group through acquisition, its finance department faced additional pressure to produce timely, ultra-granular budgets and sales reports.

Tim O'Leary, MIS Manager at BWG Foods, explains: "Each entity in our network not only sells food, wines, spirits, and other fast-moving consumer goods [FMCGs] direct to customers—they also buy goods from multiple channels, such as our cash and carry network and national distribution center.



"To gain an accurate picture of the performance of each store and generate reliable budgets, we need to distinguish the different types of sales made by each store and convenience brand. As we introduced new brands into our group, this became increasingly complex and time consuming."

*"We wanted a solution that would mitigate the risk of relying on key individuals."*

Lorton Sherlock, Senior Management Accountant, BWG Foods

BWG Foods found that the analytics solution it used to support its budgeting and sales reporting activities no longer delivered the flexibility and performance required to deliver fast, reliable information to key decision-makers.

Tim O'Leary continues: "Because our existing analytics solution offered limited automation capabilities, we often had to work late into the night during our annual budgeting cycle. A significant proportion of this time would often be spent completing tasks that had the potential to be automated, such as profiling overheads and calendarizing budgets."

Lorton Sherlock, Senior Management Accountant at BWG Foods, adds: "Because our existing analytics solution was heavily customized to our needs, I was the only member of the finance team who was really comfortable with adapting, fixing and updating it. We wanted a solution that would mitigate the risk of relying on key individuals."



*“Thanks to IBM Planning Analytics, we have been able to significantly streamline our reporting and budgeting processes and gain a highly detailed view of the performance of each of our convenience brands and individual stores.”*

Tim O’Leary, MIS Manager, BWG Foods

## Taking a new approach

Working with IBM Business Partner ProStrategy, BWG Foods set out to evolve its analytics capabilities by upgrading from IBM Cognos® TM1® to [IBM Planning Analytics](#)—accelerating its budgeting processes.

Impressed with a presentation delivered by ProStrategy, BWG Foods decided to implement IBM Planning Analytics on premises to underpin company-wide budgeting and reporting.

Tim O’Leary continues: “We evaluated a number of offerings from different vendors. IBM Planning Analytics stood out because it offered an out-of-the-box solution that would be fairly easy to implement in a short time-frame.

“Having used IBM Cognos solutions with positive results for some years, we were confident that IBM Planning Analytics could help us enhance the performance and reliability of our analytics function.”

Lorton Sherlock adds: “Compared to our previous reporting tool, IBM Planning Analytics offers a more modern, accessible user interface. Because the solution is much easier to use and more flexible in terms of building models, we also knew that we wouldn’t need to make technical changes to the system when we needed to update something.”

With help from experts at ProStrategy, BWG Foods integrated the IBM solution with the company’s third-party finance and analytics system, automating the extraction, transfer and loading (ETL) of data between these systems.

“ProStrategy offered excellent guidance and support throughout the implementation of IBM Planning Analytics and helped us get the solution up and running in under four months. The rapid implementation was especially key for us, as a recent acquisition had brought our annual financial close deadline forward by three months, so we needed to implement the solution during our busiest budgeting period.”

# Streamlined, simplified budgeting and reporting

With IBM Planning Analytics underpinning all financial performance management activities, BWG Foods has accelerated the budgeting process, eliminated its dependency on key individuals, and automated the generation of key reports.

“With our previous system it would take us weeks to complete a budgeting cycle, but now we can complete this process in just a matter of days—and without needing to work evenings and weekends,” says Tim O’Leary. “Thanks to IBM Planning Analytics, we have saved more than 240 hours on the budgeting process and over eight hours a week on sales reporting. This has made life much easier for our budgeting and reporting team and frees up more time for us to focus on optimizing our reports.

The smart automation features of the IBM solution enable BWG Foods to achieve many of these time savings. For example, the company saves a significant amount of time because IBM Planning Analytics automatically and instantly calendarizes its overheads—a process that previously took up to a couple of weeks for each budgeting cycle. Equally, automating the ETL processes between Planning Analytics and the company’s other finance and reporting systems has significantly reduced workload for the finance team.

Lenton Sherlock adds: “Not only can we generate budgets and sales reports much faster, we have also seen a great improvement in accuracy. We have never needed to send out corrections for a report since we started using Planning Analytics.”

By equipping business users at BWG Foods with a much more user-friendly interface, the company has also reduced risk and strengthened its business continuity planning. The Planning Analytics system is more structured than the company’s old system, guiding users through a step-by-step process to complete each workflow—so much less specialist knowledge is required.

Tim O’Leary concludes: “Thanks to IBM Planning Analytics, we have been able to significantly streamline our reporting and budgeting processes and gain a highly detailed view of the performance of each of our convenience brands and individual stores. With this ability to deliver accurate, detailed and timely reports, we can empower key decision-makers at BWG Foods to build fact-driven business development strategies to support future growth.”

## Solution components

- IBM® Planning Analytics

### Take the next step

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