



SOLVER, INC.

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Solver has always believed in eating their own dog food, and Solver is a result of user experience and consumer demand. After reporting primarily on data that came live from their ERP, they wanted to expand the scope of their analytics to include multiple types of data, while streamlining and structuring their processes to establish a valid system across the organization.

Solver, Inc. is a Los Angeles-based technology and professional services company that produces Solver, formerly known as BI360, a complete Corporate Performance Management (CPM) suite, as a response to market demands for improved corporate performance management solutions. Solver is headquartered in Los Angeles, with offices around the globe, serving such markets as Asia Pacific, Africa, Mexico, Europe and Middle East, Central America, India, and more, in addition to North America. The Solver family stretches wide and is comprised of some serious road warriors to better serve customers and partners alike.

After reporting and creating dashboards live from their accounting system for some time, Solver decided that their processes and the data that drove their analytics could be better managed, stored in one place and leveraged in a more organized and powerful way by utilizing the Solver Data Warehouse. "The only data we reported on was the data that we could report on live from our ERP and CRM systems. All other data was typically housed in Excel, in the cloud or in on premise databases," Solver COO Corey Barak says. "Everyone used their own structure and

system, and the data may not have been validated by the team using it. Also, there was no way of knowing what data was available and how it could be used across the organization."

In terms of process improvement, relying more heavily on the Solver Data Warehouse was a no-brainer for Solver. "BI360 [Solver] is our tool. We have high expectations, and the product suite has consistently delivered for us," Barak says. "Also, our Professional Services department looked for software for Project Management and Service Resources, but never found anything that gave us everything we wanted. We decided to just build it in-house using BI360 [Solver], and it has been successful. The Resource scheduling and reporting module has been live for approximately 2 years, and the project management module will be going live in Q3-2016."

The Solver solution is based on Microsoft SQL Server, Microsoft Excel and a web portal for end users, making it business user friendly, flexible, and powerful in terms of truly embodying self-service BI.



www.solverglobal.com

Company Profile

Solver is the leading provider of complete Corporate Performance Management (CPM) solutions for today's mid-market enterprise, and the company is at the forefront of BI technology for cloud and on-premise ERPs. Solver's Solver360 solution is a powerful and intuitive suite of modules for reporting, consolidations, budgeting and forecasting, dashboards and data warehousing.

Industry

Technology, Professional Services

Country

United States, Globally

ERP System

Microsoft Dynamics GP

“Solver, with our internal resources, has built all integrations, forms, reports, modules, dashboards, dimensions, and modules,” Barak says. “We’ve consolidated several data sources, from GP General Ledger Summary and Detail to Capital Expenditures, ADP Payroll and Benefits, and Replicon for professional services billing and travel expenses, Professional Services scheduling and reporting, in addition to Kayako for helpdesk reporting, Customer Service Satisfaction, Consulting project estimates, Commissions, Allocations, Project Management, Revenue, Strategy/Initiatives, and so on.”

Furthermore, Solver has seen the impact of their reporting and dashboards efforts through more in-depth, accessible analytics. “We have completely revamped how we review our financials. Previously, financial reports were sent out,” Barak says. “Now, we have live dashboards that show our KPIs with trend analysis, both for corporate and department levels, and then, use the financial statements for detailed analysis and to drill down if there are questions. Each department head can review their variances and enter any comments directly into the data warehouse through web forms based on those variances. We conduct monthly meetings to discuss issues. We all now have a much better understanding of our KPIs and financials and how a change in operations will impact them. There is also more thought into decision-making as we have the data to assist. Previously, someone could have argued based on assumptions.”

The Solver Data Warehouse has had a huge effect on the Solver Corporate Performance Management practice, with the technology functioning as a remarkable foundation to organizational leadership and collaboration. Therefore, the goal is to expand and enrich. “We want to continue to expand our use of dashboards and reports. We want to determine every way that impacts our company’s growth and profitability and ensure that we have the data to enable better decision making,” Barak says.

“One future area that we can concentrate on is our marketing and what marketing campaigns are successful. We would like to have win/loss ratios for each salesperson and ERP market.”

Solver is pleased with the results they have seen by maximizing the use of their own product. In fact, the successful enrichment of their current analytics, which “include professional services utilization, trending by revenue type, support tickets closed, knowledge base articles, revenue by salesperson, revenue by ERP, departmental dashboards, and financial dashboards – and 40 reports as well” are lending themselves to a whole new level of goalsetting. “We are currently working on closing the loop between strategic planning, budgeting and forecasting, and reporting and analysis,” Barak says. “We are planning on doing this by inputting strategic goals, initiatives, and by tracking the success and timing of our initiative tasks.” Finally, perhaps the most valuable outcome is that all end user activity is done in the Solver web portal, making all input forms, reports and dashboards available anytime, anywhere, in a single, user-friendly browser interface.

While financial reporting has been the focus in fully implementing the Solver Data Warehouse, Solver also uses the Solver Planning module for budgeting and forecasting models. “We have a detailed budget process,” Barak says.

“First, we have our sales manager enter the estimate of revenue by salesperson. This is a very detailed input form that used to be manual Excel sheets. Next, each department manager enters in any changes to our personnel form and our IT also enters in all capital expenditures. All remaining revenue and expense accounts are then entered at a summary level or using line-item detail. We also have a quarterly forecast. Currently, that is entered at the account level only, but we are working on building a top-down and bottom-up model for revenue and cost of sales that can be used for both budgeting and forecasting.”

Challenges

Recognizing that analytical processes, including systems and even the data that was being pulled, were not consistent or structured across the organization, Solver wanted to streamline and organize how their team was interacting with and making sense of their diverse data. Moreover, not only was Solver looking to simplify and accelerate their analyses, but they planned to upgrade the experience of working at and for the company through self-service BI.

Result

Solver has not only been the product for Solver's customers, but a key ingredient to their own internal success, especially when it comes to leveraging their accounting system data and information from other data sources as well to better understand the overall financial and operational health of their organization and effectively plan for the future. Solver plans to continue adding data to the Solver Data Warehouse for richer analytics and smarter organizational decision-making to continue to best serve their customers as a leader in the BI technology solutions sector.

Resources

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