Global Beverages Provider

IT Budget process standardised and automated across 80 countries in Europe, Asia, Latin America and Australia
Automate and improve quality of charging True-up process

Industry Beverages

Geographies Europe, Asia, Latin America and Australia

Employees 7,000+

Challenges IT Budget process:
- Offices in 80+ countries
- Highly manual
- Time consuming
- Error prone

Challenges Charging True-up:
- Highly manual
- Time consuming
- Error sensitive

Solutions:
- Apptio IT Planning
- Apptio Cost Transparency

Results Budget process:
- Decentral execution and central management and analysis
- Automated version and variance reporting
- Multiple Budget versions supported
- Central Control saved 50% time in budgeting process
- Excel replaced

Results True-up process:
- Process more standardized
- Output quality improved
- Saved 70% throughput time
- Process largely automated
- Excel replaced

Key Objectives

• Standardize/automate Budget process	• Automate True-up process
• Simplify processing/analysing versions	• Improve True-up quality
• Create global budget reporting platform	• Improve True-up analysis
• Save 50+% budget process time	• Replace Excel as primary tool

Worldwide Presence Requires Process Automation

Jacobs Douwe Egberts (JDE) is a leading manufacturer and distributor of coffee and tea products to the retail and out-of-home markets. JDE owns more than 50 brands, including some key names like Douwe Egberts, Jacobs, Tassimo, Moccona, Senseo, L'OR, Super, Kenco, Pilão and Gevalia.

With offices in 80+ countries, budgeting IT spend locally and centrally was very time consuming and error sensitive. For JDE IT Finance, budget version control and reporting was difficult and time consuming. Local IT leaders didn't have an efficient way to see their budget versions, which was based on the local costs and central service demand they entered in the budget process.

The quarterly service charge True-up was a largely manual process for IT and IT Finance. Gathering all consumption Q's based on infrastructure and application services and combining this data into the True-up took several weeks of effort every quarter.

JDE selects Apptio to Manage Budget and Charging

The first priority for the JDE IT Finance team was to automate the Annual Operating Plan (AOP) process for the global and local IT budgeting. The budget is based on the demand volume for the central services and the local and central IT costs.

JDE chose to partner with It's Value to configure and maintain the Apptio SaaS solution for the AOP budgeting and True-up processes. Both processes were based on Excel as supporting

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AOP process automated and improved

The primary goal of the implementation of the Apptio modules IT Planning and Cost Transparency was to automate the AOP process and to give Business budget owners control over and insights in their IT spend.

The centralisation of the demand capture (AOP round 1), the Rate calculation (round 2) and the actual budget planning based on costs and demand (round 3) is completely automated with Apptio.

The IT Planning module supports the cost and demand Planning and Cost Transparency delivers the Rate calculation and all the (specific) reporting around demand, costs and P&L per location.

The implementation realised three main deliverables:

- Quality improvement: Excel is very error sensitive, Apptio uncovered several weak data and process points
- Time saving: the central IT Finance department now spends about 50% less time to generate the yearly AOP
- Better control: the automatic reporting and variance analysis give IT Finance the ability to focus on the strategic aspects of the budget to support the CIO, instead of merely processing data just to get the budget delivered

True-up charge process automated

The AOP process delivers the budgeted service demand volume per cost centre. Every quarter this volume is matched against the actual consumed volume: the True-up process. This process was based on manual gathering of data and processing in Excel.

Apptio Cost Transparency was used to automate the determination of the actual consumed volume and to match it against the budgeted volume to create the quarterly True-up adjusted invoice.

The process improvement delivered several outcomes:

- Time saving: the largely automatic creation of the True-up invoice saved about 70% of the execution time
- The shorter True-up process enables a monthly True-up to

"Our ability to create and analyse the IT Budget has increased significantly, and the quarterly True-up process is upgraded to a monthly process, all based on Apptio"

— Ines Rodrigues,
IT-Finance manager
Jacobs Douwe Egberts

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