

# Performance Canvas



## The Road to a more Structured Budgeting Process

### Company Profile

Solix Inc. was founded in 2000 and is based in Parsippany, New Jersey. It also operates customer care locations in Illinois and Texas; and a grant management services office in Kansas. Solix Inc. is a privately held corporation.

Solix provides onshore business process outsourcing services for businesses and government agencies. The company offers eligibility determination and processing, program management and consulting, and contact center solutions. It also provides applicant screening, qualification processing, and reporting services. In addition, the company offers customer, lead generation/sales, surveys/research, direct response, and order taking services.

### The Challenge

Allen Lane is the Chief Financial Officer and Carol Kenner is the Chief Accounting Officer for Solix. They both work a lot with reporting and budgeting. Carol describes their challenge as this:

"We have a number of different operations departments where we allocate common costs and that has always been a pain point for us in that we were not able to use the Active Planner solution.

Active Planner also required us to do roll ups from the smallest, most granular budget groups to the next level and then to the level beyond that. This is just one example of a situation which could lead to errors.

Additionally, we never really got great reports with Active Planner, you cannot do instant changes in the reports and we had to export everything to Epicor Enterprise instead of reporting right out of Active Planner.

Lastly, we needed to figure out a way to budget for different departments where staff's home department is a work department such as service delivery/ quality assurance/ EPMO and then we needed to figure out how to get their costs - direct costs and allocations / common costs back to the customer responsibility/ profit centers. This was something that we needed configured specifically for our business."

### The Solution

"I looked at Hyperion before. At that time, I had not seen Performance Canvas Financials demonstrations at one of the Conferences but people who had seen it returned from the conferences and reported that it looked really great. There was a lot of good feedback on Performance Canvas Financials and also about how it resembled Hyperion in many ways." - Allen Lane, CFO

"We were not sure at implementation whether we were going to use

## Case Overview

### Company

Solix

### Industry

Customer Care

### Verdict

"Performance Canvas' reporting capability is a pleasant surprise in addition to its Budgeting capability."



### Contact us for more information on Performance Canvas Products

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# Case Study

Performance Canvas Financials for reporting, but our consultant kept telling us that Performance Canvas Financials is great for reporting. We were really surprised that Performance Canvas Financials was recommended for reporting by different Consultants (although we always kept our eyes and ears open). It was indeed a pleasant surprise when we learned that Performance Canvas Financials' reporting capabilities were very advanced, just as its budgeting is." - Carol Kenner, Chief Accounting Officer

## The Performance Canvas Usage

"Right now, we are using reports that we created in Performance Canvas Financials for all financial reporting, P&L, and balance sheets distributing them internally and then to the board. We did the budgets using those reports. It is really working out great. I am sure we will need other types of reports in the future but right now I can tweak, recreate, and change reports.

Then there are regular/standard reports we are getting out of ERP 10 where we are starting to have discussions around which ones are good, which ones need modification, or which ones can be created in Performance Canvas Financials. I want one of our team members to be specifically trained so that he can fulfill all of our reporting needs using both ERP10 and Performance Canvas Financials." - Allen Lane, CFO

## The Quantifiable Benefits

"There were a few quirks that we had to work through. The reports had macros in them, whereas for Solix purposes, we needed static reports without macros that we can generate so then it could link up to other excel spreadsheets that fed into the power point decks that we distribute. We got that worked out and it works great.

To quantify, it is just fantastic. I can go in and run the reports out of Performance Canvas Financials (this takes a bit of time since there are so many tabs that need updating) but once that report is run it takes me only 30 seconds to save it, open up the other spreadsheets it is linked to, open up the powerpoint presentation it is linked to, and it all just flows straight through. It really is great.

And for budgeting, changing one headcount in one department

changes the allocation for all other departments. This used to take days honestly. It isn't just even about the time, we were unable to do any kind of "what if" analyses.

This is one of our biggest benefits with Performance Canvas Financials. Whereas in the past; it was so frustrating for us because when we did the budgets or even just the month's financials, we couldn't do allocations until the very last minute because time constraints didn't allow us to calculate allocations with preliminary numbers.

In terms of how the product works for budgeting, it really could not be better. Once we got over the glitches of the customization, it was perfect. Performance Canvas Financials is really powerful.

At the same time we were entering our budget data, we were making changes on the fly and Performance Canvas Financials was able to handle that so that we can do "what ifs" scenarios and then see its impact on the costs. It all works together and then it rolls up automatically.

Lastly, Performance Canvas Financials self-checks. It does cross checks by batch so it is very easy to check for errors. This is something that we struggled with in the past that has been fixed."

## The Future

"We've had some discussions on future uses of Performance Canvas Financials such as doing dashboard type of metrics. We are not using a BI tool that is embedded in ERP 10, we are doing it through another tool, but it is something that we still can link into Performance Canvas Financials so we are looking at that."

## Recommendation

"If I were to rate the product from 1-10, I would say 10. If there is a customer out there that has a specific functionality need and Performance Canvas Financials meets it, I would absolutely recommend it. It does take a bit longer to implement than one thinks, in our case because we had so much customization, but in terms of configuration of the business into Performance Canvas Financials, it is really great and powerful."



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