

Digitalization of Bertelsmann Group's Management Reporting

Bertelsmann's Arvato division has been using FluenceXL's self-service reporting and analysis products for over a decade. The flexibility and ease of use of the solution has led to FluenceXL – now part of the Fluence platform – to become a central component of general management reporting at the Group level.

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BERTELSMANN

Industry: Media, services and education

Size: 145,000 Employees

Location: 50 countries worldwide

Sales: €18.7 billion in 2021

THE CHALLENGE

Bertelsmann's central Group reporting team needed fast, simple and flexible access to an extensive range of financial data. The department also needed full control over the way standard reports were designed – including complex formatting and layout requirements – without having to depend on internal or external IT resources. As the team explored its software options, they also recognized the need to manage ad-hoc reporting requests, and to support users who wanted to conduct more comprehensive analysis.

THE SOLUTION

Bertelsmann uses Microsoft Analysis Services technology to generate a data model from the SAP BFC Consolidation platform which is optimized for the Finance department's reporting requirements. The combination of a rich data model with powerful reporting and analysis functions was crucial for success.

FluenceXL offered the ideal solution, thanks to its extended range of functions that simplify report development. FluenceXL's add-in for Microsoft Excel, for example, allows Bertelsmann's business users to leverage their existing knowledge of a familiar tool and to connect directly to the Analysis Services platform. This minimized the learning curve as the Bertelsmann team transitioned to advanced reporting and led to a high level of adoption. Just as importantly, using FluenceXL eliminated the risk of having Bertelsmann rely on Excel for data storage.

Bertelsmann is a media, services and education company that operates in approximately 50 countries worldwide. The Group includes RTL Group, Penguin Random House and the service provider Arvato. With around 145,000 employees, the company generated sales of 18.7 billion euros in 2021.



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FluenceXL gives us the flexibility that we need to efficiently implement the ever-evolving requirements of our financial reporting.



Sven Krampe
Senior Director
Business Intelligence

FluenceXL has become the central management reporting tool in Bertelsmann group reporting. It has grown with the requirements of the company and has helped to create added value in terms of quality and speed of reporting.

Looking to the future, FluenceXL connectivity to Azure Analysis Services, Power BI data and the Azure Web App gives Bertelsmann choice and flexibility in terms of any architectural changes to come.

THE RESULTS

Bertelsmann's success with the initial group of 30 FluenceXL users has led to the software now being deployed in a range of other areas across the business.

In fact, FluenceXL is now used by almost 300 staff for a wide range of financial reports. These include monthly statements, planning and forecast data, as well as business-specific operational and customer analysis.

The FluenceXL Portal is used to provide a fully customized view for different audiences. Each audience has tailor-made views on the data which interests them most. One group of power users creates and publishes these reports for the wider audience. This coordinated approach ensures the quality and consistency of the reports. Any user can also access the reports at any time by means of a web browser. FluenceXL's scheduling service helps automate report distribution using Excel, PDF or PowerPoint files. Finally, the FluenceXL app enables access from mobile devices, and reports can be fully responsive to enable meaningful use of live data on the go.

EVOLVING BUSINESS NEEDS

FluenceXL's continuous development and widening product scope has proven to be extremely important for Bertelsmann as requirements have evolved over time. The IBCS-certified charts helped implement a reporting style that aligned with Bertelsmann's corporate standards. Bertelsmann was also able to count on FluenceXL's SSO layer for the introduction of Okta to simplify authentication in a complex, multi-system environment.

