



Customer: Aevum

Web Site: www.aevum.com.au

Customer Size: 100–5,000

Country or Region: Australia

Industry: Retirement accommodation and care

Partner: CALUMO Labs
www.calumo.com

Customer Profile

Aevum provides retirement accommodation and care services for Australian seniors in New South Wales and Western Australia. The company owns and manages 20 retirement villages and employs 300 staff.

Software and Services

- Products
 - Microsoft Office Excel 2003
 - Microsoft SQL Server 2005
 - SQL Server Analysis Services
 - SQL Server Integration Services

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Executives Gain Flexible Budgeting and Forecasting with Microsoft Data Management

“Management has much greater capacity to do accurate financial planning, so all our business customers are a lot happier.”

Peter Homan, Chief Financial Officer, Aevum

Retirement village operator Aevum needed sophisticated business reporting to maintain and grow its portfolio of properties. In 2007, it deployed the CALUMO business performance management suite from Microsoft Gold Certified Partner CALUMO Labs. This suite, built on Microsoft SQL Server 2005, enabled Aevum’s finance department to analyze and compare costs across the business with fast, up-to-date and easy-to-use reports and a web browser interface.

Business Needs

Aevum owns and operates a network of 20 retirement villages and care homes across New South Wales and Western Australia. The company is expanding: having spent \$125 million on new facilities in 18 months, Aevum now manages 2,000 units of accommodation and 200 aged-care beds.

In addition to normal corporate requirements, Aevum’s finance department has to comply with complex government reporting regulations. These require Aevum to keep detailed accounts for 60 separate cost centers. Since the business was growing rapidly, its challenging reporting needs were continually changing.

Until mid-2007, Aevum relied on an old reporting package that took data from the company’s general ledger. However, the package was inflexible – it could only produce a limited range of reports and finance staff could not interrogate the data or make useful comparisons between cost centers.

“If we wanted a report on people costs, for example, we would get data on salaries, wages, and taxes,” says Peter Homan, Chief Financial Officer, Aevum. “But to get any extra detail you would have to generate a whole new report, which was time consuming.”

In addition, the existing reporting system could not keep pace with the rapid changes at Aevum.

"The old system required a high level of technical knowledge to generate a new type of report," adds Homan. "If we needed a new report, a consultant had to come in and code it, which was very costly."

Solution

In June 2007, Aevum decided to implement the CALUMO business performance management suite from Microsoft Gold Certified Partner CALUMO Labs.

CALUMO Labs's product is built on the Microsoft SQL Server platform and Aevum opted to host the system on Microsoft SQL Server 2005. The CALUMO suite uses SQL Server Integration Services to extract and integrate business data from a variety of sources into a data warehouse.

Working with Aevum, CALUMO helped structure the data in ways that give the company comprehensive analysis capabilities.

"We helped Aevum import its data into the classic information cube," says Richard Quaine, Consultant at CALUMO Labs. "Then we used SQL Server Analysis Services to structure the data into different dimensions, such as an accounts dimension for profit-and-loss reporting, or a business structure dimension for the aged-care and self-care business units."

By defining hierarchies within each dimension, Aevum made sure report data was available to sufficient levels of detail across all its business activities. In particular, the firm could now compare data across different cost centers.

"CALUMO also has a web interface that allows people to browse the data cubes," says Quaine. "Users can drag and drop data into rows and columns in a Microsoft Office Excel spreadsheet, which makes it very easy to generate bespoke reports."

Aevum also took advantage of security features within Microsoft SQL Server Analysis Services so that the finance department could control access to sensitive business data for different business users.

Benefits

The CALUMO business performance management suite brought Aevum a range of immediate operational and business benefits. Finance and business reports became more sophisticated while taking less time to produce. In addition, business customers gained better access to information.

Sophisticated reporting

Aevum's finance department can now manipulate data much more easily.

"I can make comparisons across five different time periods or across different areas of the business or across different versions of the same set of numbers," says Homan. "For example, I can compare actual numbers versus forecast versus last year's forecast or any other forecast scenario."

"I can also mix information from different sources. For example, I can combine general ledger information with a set of forecasts for a potential acquisition from a completely different system. This really helps the business understand the financial implications of a particular acquisition."

Time to think

The finance department also accrued considerable time savings.

"I can redeploy staff from low-value to high-value tasks," says Homan. "The system has reduced the time taken to produce board reports from 12 hours to 30 minutes, and my staff don't have to stay here until 9pm."

"I can also do much more. Doing a yearly budget with 60 cost centers used to generate a mountain of spreadsheets. Because of the write-back feature in CALUMO, I can experiment with input data, comparing it with general ledger information without any danger of polluting the original data."

Better information for business customers

Lastly, finance department data is more useful. Business unit managers get the reports they need faster without help from the finance department. The web browser interface allows managers, who have little IT training, to interrogate finance and business data remotely, while the finance department gets to control who sees what.

"Management has much greater capacity to do accurate financial planning, so all our business customers are a lot happier," says Homan.