



**Improving Business Performance  
through Modern Finance Analytics:**

# 10 Stories of Success

# More visibility. Deeper insight. Smarter moves.

In finance today, budgeting, bookkeeping, and reporting are just the beginning. You're also tasked with driving growth, profitability, and business resilience – and using data to do it. That requires a solution that can handle huge volumes of data with speed and agility.

**Thousands of finance teams around the world are using Qlik® to get unprecedented, in-the-moment insights that move the business forward.**

Finance executives, management, and staff use Qlik daily to:



**DRIVE OPERATIONAL EFFICIENCIES**  
through automation and actionable insights



**ENABLE TIMELY DECISION-MAKING**  
especially amid uncertainty



**INCREASE REVENUE AND PROFIT**  
with boosts from machine learning and predictive analytics



**CREATE A DATA-DRIVEN CULTURE**  
with ready access to trusted, business-ready data



**BETTER UNDERSTAND AND CONTROL RISK**  
by unifying data across silos

In the following pages, you'll see the stories of 10 companies using Qlik to better manage expenses, revenues, profitability, cash flow, balance sheets, compliance, and risk.

## RAYMOND JAMES

Qlik has enabled one of America's largest and most diversified financial services firms to:

- Centralize data through one platform for faster analytics and action
- Drive higher-value service from financial advisors through data
- Streamline operational costs and meet regulatory data needs

**30% increase**  
in management  
productivity

**75% improvement**  
in data quality

**3 weeks**  
for new app  
rollouts

“**The Qlik platform has given the team at Raymond James the ability to streamline data with a single source of measurement across the board, enabling true digital transformation.**”

**Laura Ashworth**, BI Architect and Analyst Lead, Raymond James Financial

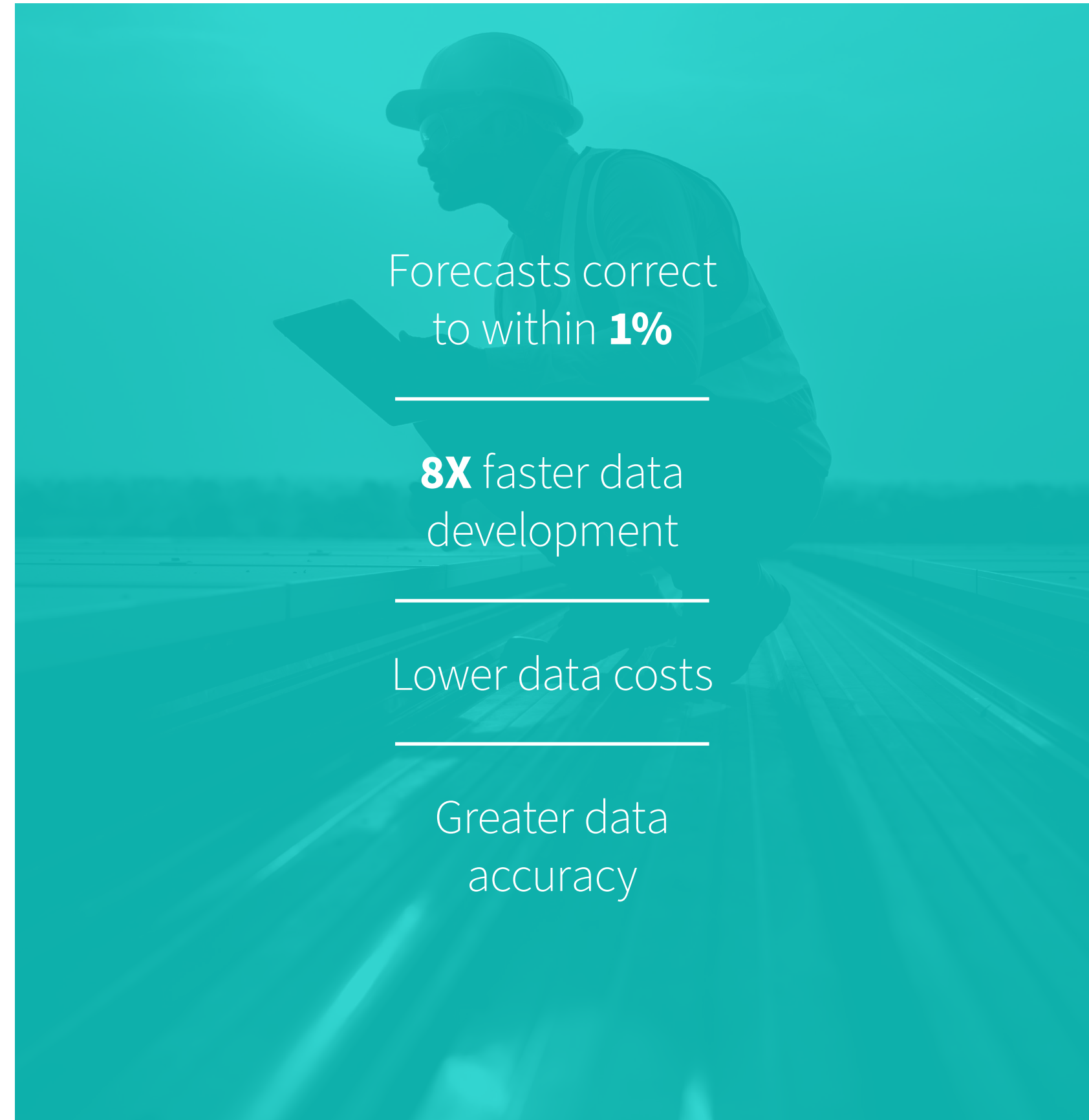


When slow data delivery was leading to missed opportunities, the multinational energy and automation company:

- Built an integrated data pipeline to provide near-real-time data to end users
- Began using log-based change data capture to stream data from all sources, even mainframes
- Decreased the costs – and increased the speed and accuracy – of pulling data from source systems

“**We can provide our users and our internal data team with the near-real-time data they need.**”

**Clint Clark**, VP, Finance Performance Systems and Data, Schneider Electric





Real-time data  
made accessible

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Manual labor – and  
human error – reduced

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Data-driven  
culture established

## Wicked Sister

As the Australian dessert company experienced rapid growth, Excel spreadsheets were hampering their efforts to get visibility into their financials. Once they adopted Qlik, they were able to take a truly data-driven approach to profitability, cost projections, and production schedules by:

- Replacing static Excel reports with “living, breathing” dashboards that drive decisions every day
- Extending the power of analytics to every employee while keeping data governed with role-specific permissions
- Tracking budget versus actuals to accurately determine cash flow
- Measuring the performance of specific retailers to identify the stores leading sustainable growth
- Developing a forecasting dashboard to input and plan various parameters

“**Qlik Sense® lets us get granular into our business and quickly analyze our financial health to make smarter decisions. And unlike our experience using other BI tools, Qlik Sense is incredibly user-friendly. Other platforms I’d tried required me to have the skills of a developer to create dashboards.**”

**Nandani Datt**, Finance Manager, Wicked Sister



With Qlik, 162 National Health Service Trust Foundations across the United Kingdom have a single platform for:

- Gaining insight into financial performance, P&L, patient-level costing, service-line reporting, and suppliers – in minutes
- Clicking through from high-level costs to individual line items – in seconds
- Seeing hospital, finance, and other data in new ways, allowing deeper querying – and encouraging users to explore the “why” behind the “what”
- Pulling together disparate data to create fast, accurate reports that give a single version of the truth

“**At any time, we can see income and expenditure for service lines, even getting a P&L for each patient. We’re linked into the external data feeds, so we can benchmark against peers, too.**”

**Darran Hague**, Head of Corporate Information, St. Helens & Knowsley Hospitals NHS Trust



**Just 4 days**  
to build and deliver a  
balanced scorecard app

**8 hours/week saved**  
by finance team



Genzyme, a leader in the discovery of therapies for rare diseases, uses Qlik across several functional areas. In finance, Qlik empowers Genzyme to:

- Access key, up-to-the-minute data in a single view
- Get a comprehensive look at productivity, efficiencies, and revenue
- Give senior managers the power to analyze and report on business strategy and future planning with a balanced scorecard app

**“Qlik is absolutely about intelligence and business discovery, and I can’t think of any limitations. Genzyme very much considers Qlik a people-driven tool, in that the more they use it, the more people appreciate the ease with which they can, within hours, develop an application for their departmental use in line with business strategy objectives and KPIs.”**

**James Sharp**, Regional IT Manager, Genzyme

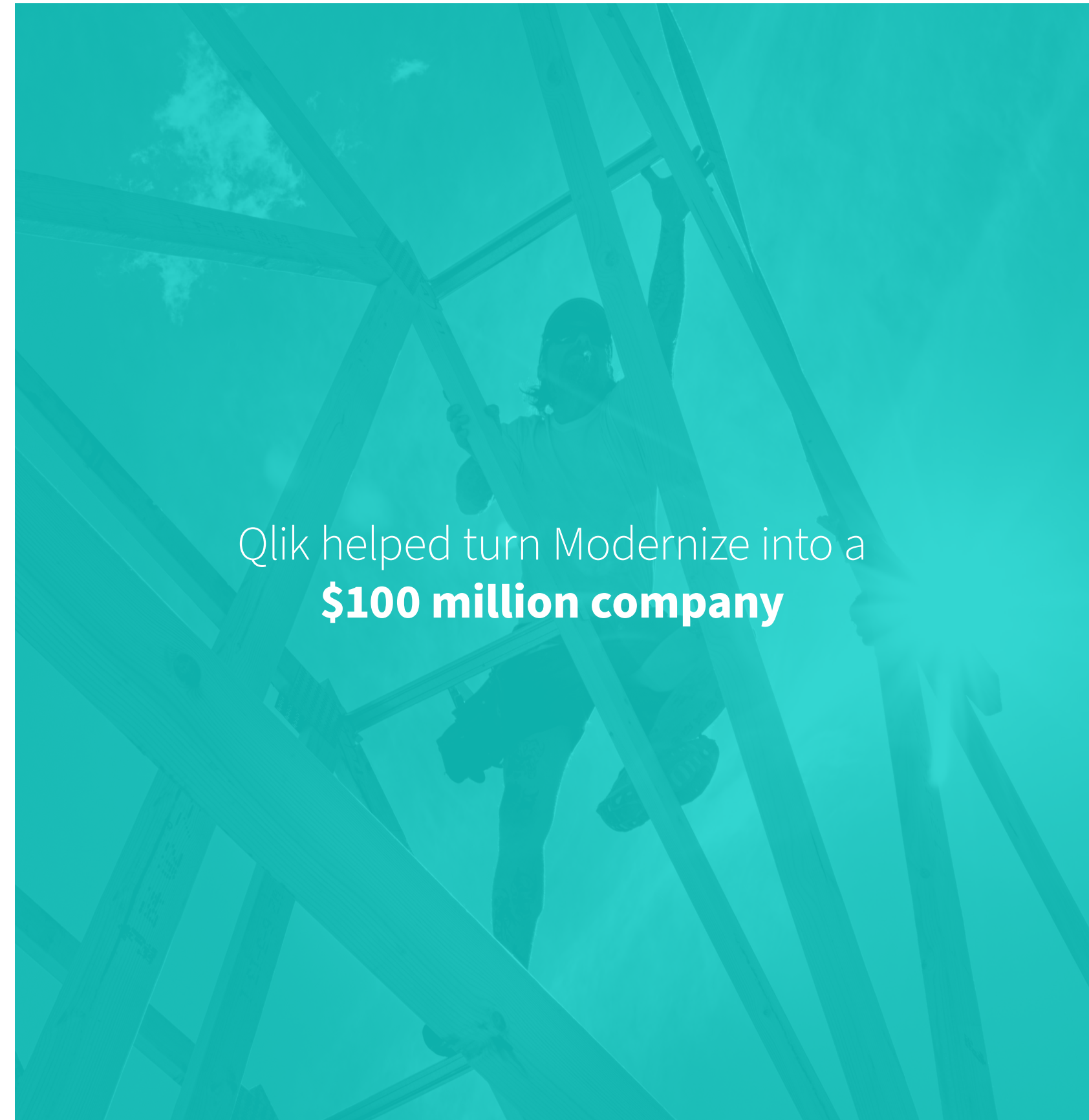


Modernize Inc. matches homeowners with reputable efficiency-focused contractors. They credit Qlik for helping them in a number of functional areas, including finance, by allowing them to:

- Benefit from precise analytics and easy reporting
- Create a culture of pride of ownership by providing up-to-the-minute financial growth analytics to all employees

“**Modernize’s financial details aren’t kept under lock and key, they’re on view for everyone in the company to see, displayed on several large monitors throughout the office. That way, employees can review up-to-the-minute growth analytics while they go for a second cup of coffee.”**

**Ben Panzarino**, Affiliate Marketing Manager, Modernize Inc.



Reduced financial preparation time **from 5 weeks to 5 days**

Estimated resource and time **savings of 30%**



As the world's largest dedicated security technology company, McAfee understands the need for businesses to adapt and respond quickly to change. With Qlik, McAfee has:

- Significantly decreased time and resources spent on aggregating reports
- Achieved a single source of truth for data to feed financial decision-making
- Improved key business processes
- Given users self-service automation and real-time data refresh
- Provided executives with portfolio information to make quick, effective decisions

“Qlik allows the data experts in the business to do reporting efficiently without a lot of overhead. The solution's performance is phenomenal, and the business discovery our employees are enabled to do now has had a great impact on our business.”

Jeff Brobst, VP Financial Planning and Analysis, McAfee



At insurer Colonial Life, management, finance staff, and budget coordinators use a Qlik-powered expense reporting solution to:

- Stay on top of current month, QTD, and YTD departmental budget and actual expenses
- Drill down into research expenses at a detailed transaction level
- Reconcile budget and actual head count
- Efficiently identify inaccuracies in expense transactions

“**Qlik is exactly the tool we’ve been looking for. We need BI powerful enough to support the sophisticated analytical needs of our business analysts, yet easy and intuitive enough to be used by nontechnical sales representatives across the country. Qlik is the only reporting and analysis solution we’ve seen with that sort of flexibility.”**

**Bryan Allen**, VP, Business Intelligence & Analysis Services, Colonial Life

**100+ production applications**  
deployed enterprise-wide

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**400+ users** analyzing data  
volumes **up to 50 million lines**

Report development  
time reduced by  
**10 hours/month**

Application built  
in a few days

## Deloitte.

Deloitte's Finance & Control department uses Qlik to help manage the complex task of delivering relevant reports for divisions across the enterprise. As a result:

- Disparate data sources – including the data warehouse and numerous spreadsheets – are connected for a single version of truth
- End users are getting data-based insights in addition to standard reporting
- Consultants are saving significant time by gaining control of analysis and using powerful visualization capabilities

**“Qlik... saves the organization significant amounts of time. For our department alone, we estimate that we save approximately 10 hours per month on developing and distributing reports. The time it saves our team leaders is equally significant.”**

**Frank Kneefel**, Manager Finance & Control, Deloitte (Netherlands)

# WILEY

Publisher John Wiley & Sons, Inc. uses Qlik to help its professional and scholarly partners to:

- Analyze and visualize financial performance data to monitor trends and plan budget based on historical fluctuations
- Shift from overly technical reports to dashboards that support better operational decisions

“Previously, almost all of our analysis was spreadsheet-based, and what we were delivering to our societies wasn’t as actionable. With the development of the Society Dashboard, data access is more instant and provokes new questions. We took the success that we had internally with the Sales Dashboard and projected it onto a new data set for external use with the Society Dashboard. We’ve dreamed of doing this for a long time.”

David Hogben, Vice President Data and Analytics, John Wiley & Sons, Inc.



**From 50 to 1,000**  
Qlik users in under 5 years

# Make the data-informed moves that drive you forward.

With Qlik's end-to-end solutions for integrating, analyzing, and acting on data, you gain the power to revolutionize:



## Expense management

Explore up-to-the-minute information across expense, procurement, and contract data

Set up thresholds and alerts for in-the-moment monitoring of spend



## Financial planning and analysis

Accurately compare forecasting with actuals in real time

Put the power of predictive analytics in the hands of your team



## Revenue and profitability management

Shift focus from reporting to making decisions that drive profitability

Monitor revenue and profitability in real time



## Compliance and risk management

Immediately identify activities and processes that compromise risk models

Gain instant awareness as external events impact your organization



## Working capital and liquidity

Create real-time visibility into working capital and liquidity

Generate predictive insights into credit approvals, collections, and accounts receivables performance

# Transform the finance function – and the business – into a data-driven innovator.

Today, it's more important than ever to have the in-the-moment agility, flexibility, and forward-looking insights that lead to timely action. That requires empowering your finance team with real-time information about your market, customers, and operations.

Traditional business intelligence strategies can't handle those demands, but Qlik can – with an end-to-end solution for synthesizing all your data sources (no matter how disparate) into powerful analytics that give you insights you can act on in every business moment.

## How can Qlik help your finance organization?

[Start Here](#)



## ABOUT QLIK

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Qlik's vision is a data-literate world, where everyone can use data and analytics to improve decision-making and solve their most challenging problems. Our cloud-based Active Intelligence Platform delivers end-to-end, real-time data integration and analytics cloud solutions to close the gaps between data, insights and action. By transforming data into Active Intelligence, businesses can drive better decisions, improve revenue and profitability, and optimize customer relationships. Qlik does business in more than 100 countries and serves over 38,000 customers around the world.



[qlik.com](https://qlik.com)