



Sport New Zealand

A Mero success story



The problem

While Sport NZ is not a huge corporation, its team of 100+ was large enough that budgeting and forecasting had become cumbersome. The organisation's finance department relied exclusively on complex macro-driven excel spreadsheets for capturing and reporting budget and forecast information. The spreadsheets were difficult to read and digest for budget managers.

Key individuals were tasked with keeping spreadsheets up to date, but this process was time consuming and complex, and managers and other decision makers couldn't readily access needed information. Each new budget revision brought the problem front and center again.

The Sport NZ team knew they needed a "purpose-built, straightforward and simple solution," said Gillian Peoples, Acting Finance Manager at Sport NZ.

We were ready to find a better system, something that could benefit the finance team but also make life easier on our managers by delivering direct access to real-time budgets, on demand.

The decision makers within the finance team at Sport NZ spent nearly a year researching various solutions and tools to determine what features and functionality they needed and would use most. Sport NZ put out a formal RFP for a dedicated budgeting, forecasting and reporting application, and received nearly a dozen responses. Just before Christmas 2018 they selected Mero to implement Workday Adaptive Planning.

The solution

Mero specialises in wrangling data from any diverse source, especially real-time strategic and financial KPIs, and harnessing that data to drive business insights. Mero offers analytics, planning and integration solutions throughout New Zealand, with offices in Auckland, Wellington and consultants in Christchurch.

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The Mero team is incredibly supportive and proactive. They not only helped us design a purpose-built solution to fit our needs, they also created a user group to connect us to other companies using their tools, allowing us to learn and adapt from others. That speaks volumes about the confidence they have in their solutions and methodology, and it has made a measurable difference in enabling us at Sport New Zealand to create a best practices approach for all budgeting and forecasting activities.

Gillian Peoples

Acting Finance Manager, Sport New Zealand

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The company

Sport New Zealand (Sport NZ) is a government entity responsible for overseeing sport and recreation across the country. Sport NZ believes that growing the quality of participation opportunities helps to maximise wellbeing; in particular, improved physical and mental health, creation of social connections, reflection of cultural identity and improved knowledge and skills. Sport NZ's vision is Every Body Active. This means being physically active through play, active recreation and sport. No one missing out. Every New Zealander able to access a quality experience at home, within their neighbourhood and across their community.

Sport NZ is particularly passionate about helping youth and young adults incorporate more physical activity into their daily lives. The organisation provides direction to the sport and recreation sector and works to help its partners, including national and regional sports organisations and regional sports trusts, to reach their fullest potential for the good of all New Zealanders.

The organisation of more than 100 employees invests in organisations across the play, active recreation and sport sector in New Zealand, including recreational and national programmes, coaching development and school activity. The larger Sport New Zealand Group also includes High Performance Sport New Zealand (HPSNZ), a subsidiary responsible for leading New Zealand's high performance sport programme.

The team of nearly 40 individuals has deep expertise in Workday Adaptive Planning, as well as a wide range of enterprise and open-source analytic technologies, boasting an impressive track record of delivering greater business agility and increasing the value of internal projects.

Sport NZ chose Mero after being introduced to members of the team. "We met with a couple of representatives from Mero and were particularly impressed when we discovered they would be the same people who would support our project," said Peoples.

She continued, "Mero had just completed a similar implementation with another New Zealand Government Ministry. We aren't a large organisation and didn't have a massive budget for this project, so their previous experience was highly valuable in accomplishing our goals for this project."

Mero, a licensed Workday solution provider, suggested Workday Adaptive Planning as a way for Sport NZ to move beyond their excel spreadsheets and create an easier, more transparent and streamlined approach to their budgeting, forecasting and planning process.

After consulting with the team, Mero settled on additional project deliverables to address the need of Sport NZ:

- Profit and Loss planning and reporting
- Personnel and travel planning
- Other detailed expenses planning
- Capital Expenditure Planning
- Integration with Sage 300 for automating the load of P&L balances and transactions.

"We had considered other solutions in depth, but in choosing Mero we recognised that Workday Adaptive Planning was the right fit for our organisation," said Peoples.

“It checked off several important boxes for us, including that we could run it in house and not need to constantly incur consulting fees. It also was simple to operate and easy for our managers to use and find value in, and it would give us the instant online data aggregation we needed via a friendly, familiar user experience.”

The results

Sport NZ selected Mero just before Christmas, and on January 16 the project officially started. The implementation period proved to be a smooth process, and by early March the Workday Adaptive Planning models went live. The integration of actuals from Sport New Zealand's Sage 300 system would be complete a couple of months later.

"I had my regular work to do during the implementation process, so it was a relief to have the project managed on time and on budget," Peoples said. "March and April are the busiest months of the year for us, and as soon as it was live we went straight into



our final forecasting and next year's budgeting process. We were amazed at how much easier it was to aggregate information while still keeping an element of familiarity that helped the team more easily adapt. Right from the get go budget managers really bought into the process and the general consensus was that the tool was a huge improvement on the old excel spreadsheet."

Sport NZ found that keeping the tools around budgeting and forecasting simple would prove the most successful. An easy to use interface, coupled with quick-glance dashboards and the familiarity of excel plug-ins, made it easy for managers including our Senior Leadership Team to readily access and evaluate budgets, and offer feedback as necessary.

“It's been a huge help to have all of our transactions integrate with Workday Adaptive Planning on a daily basis, this makes it possible for managers to go in, at any point in time, and see whether a certain item has come in or run their own variance analysis.”

Transitioning away from spreadsheets has provided additional benefits for both budget managers and the Finance team, quick real time access to budget and actual financial information including detailed transactions, with significant time savings and far fewer errors across the board. "Working with Mero and implementing the new system has been very positively received at Sport NZ," said Peoples. "It has placed us in a better position to manage employee changes as needed, because it's easier for every member of the finance team to get up to speed and help support the budgeting process."

Over the past 12 months the team has incorporated OfficeConnect to make it easier for the Board and management to have professional, comprehensive reporting. "As part of the larger New Zealand government, Sport NZ is tied into the government's reporting structure," said Peoples. "So we would love to see more consolidation and integration to make budgeting and forecasting seamless across the entire group

They are currently in the process of more closely linking budgeting and forecasting to detailed business planning.

The future

Sport NZ is eager to take advantage of additional tools available through Workday Adaptive Planning. These include Balance Sheet and Cashflow, more detailed insights through the development of dashboard and reporting potentially against both financial and non-financial measures.



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