



## Adapting through business transition

A Mero success story



Mero has a very pragmatic approach, with knowledgeable consultants who work alongside us rather than just telling us 'this is the way it has to be done'. This consultative style got us up to speed really quickly.

**Johan Vendrig**  
Chief Information Officer  
Orion Health

Orion Health engaged Mero Ltd to lead the successful transformation of its financial reporting, budgeting and forecasting during the implementation of Workday Adaptive Planning cloud software.

With the Finance Team battling a lengthy month-end process, multiple spreadsheets with little version control, data reconciliation issues and the need to consolidate across 35 global subsidiaries, the business had to find a solution.

"We had significant limitations in how we could organise and report information, and we needed better forecasting, it was an absolute nightmare for our finance team," says Orion's CIO Johan Vendrig.

"With Workday Adaptive Planning, we sped up the month-end reporting and we can implement changes a lot faster, which are then reflected in our reporting systems. This means our decisions are better informed, and we can provide a consolidated view almost automatically."

### Multiple Currency Reporting

With the business operating in 15 countries, another key focus was the ability to plan and report in multiple currencies. The new system provides a 'constant currency' view of profitability across all business units and countries.

### Informed Restructure

Orion recently underwent a major restructure that Vendrig says would have been almost impossible without Workday Adaptive Planning.

"Although it was still challenging given the complexity of the restructure, Workday Adaptive Planning gave us a way of regrouping and reporting information into the alternative company hierarchies, our existing systems really wouldn't have been able to do that."

The business went from a traditional functional structure, splitting into three "product groups". The sale of one of those groups was informed by data from the new system.



When reorganising our business, we had to report in a very flexible way across a changing business. I am not sure how we would have done it without Workday Adaptive Planning, our previous system just wouldn't have coped with our recent restructure.

### Challenges

As well as the uncertainty of a restructure, there were several other business challenges to overcome. Changes to the CRM and FMIS systems meant it was difficult to look too far into the future. While complex data structures were one of the main reasons for the new system, they also created their own challenges.

Johan says Workday Adaptive Planning helped them solve the problem, but their unnecessarily complicated data set also pushed the system to the limit at times.



The reason we chose Mero was because they were very open to a flexible approach, and they lived up to that very well.

## Three-phase Efficiency

The cloud technology meant a very short, efficient implementation. Johan says most of the consulting was around the data design rather than the technology itself, which meant being able to discuss what matters much faster.

"While that is a standard sales pitch around software-as-a-service, in Workday Adaptive Planning's case, I think it's very true," he says. The project was split into three phases, which enabled the Orion team to quickly become proficient at model configurations, loading data, and creating their own reports.

"During Phase One Mero did most of the work, then Phase Two we started doing most of the work with Mero advising, and in Phase Three we did the work and Mero just came in on an 'as-required basis', to answer questions and give some advice."



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## Collaboration and Flexibility

Orion selected Mero based on the team's flexible, collaborative approach and its local presence. A dedicated project space saw Mero consultants working closely with the Orion team, enabling a 'show-as-you-go' process, often around a table with a whiteboard and screen.

"The approach we have is agile, get something up really quickly then work through it – so you really need good, knowledgeable consultants that know the pitfalls, and can work fast without stumbling," says Johan.

"The Mero consultants worked alongside us rather than just telling us 'this is the way it has to be done'. This consultative style got us up to speed really quickly."



If forecasting is important, particularly across multiple countries or multiple subsidiaries, then Workday Adaptive Planning is a really good answer to that.

## About the Customer



Orion Health is a New Zealand-based global software company that delivers and sells healthcare software. It provides the software for healthcare providers from integration through to population health management and precision medicine. It has more than 450 customers in 15 countries and about 900 staff globally.

## Summary

Orion Health engaged Mero Ltd to lead the successful transformation of its financial reporting, budgeting and forecasting with the implementation of Workday Adaptive Planning cloud software. The business had limited reporting and forecasting functionality due to multiple spreadsheets, manual processes and ageing systems. Providing a consolidated view across 15 subsidiaries was very challenging. The project objectives included the provision of consolidated reporting of P&L, transparency and comparison of actuals, budget and forecast across the whole organisation, a central point for planning personnel changes, sales pipeline forecasting, version control and the ability to plan different scenarios.



Once gathering and consolidating inputs from multiple parties is getting too complicated, or too manual in Excel, then it is time to look at something like Workday Adaptive Planning.

The Mero team created input sheets and reporting for: P&L reporting and planning of expenses and revenue; personnel planning including remuneration and FTE changes; project billing showing utilisation rates; and cost allocations to solution group for management reporting.

Workday Adaptive Planning was successfully implemented and rolled out to 60 users in 15 countries using 13 currencies, on time and on budget. It is integrated with the FMIS and data warehouse for loading balances, transactions, exchange rates, billing utilisation and personnel data. It provides one 'constant currency' view of profitability of all business units and countries.

## Business Benefits

- Faster, more accurate financial reporting and forecasting
- Good version control
- Easy consolidation across 35 subsidiaries
- Faster implementation of changes
- Better-informed decision making
- Ability to report with flexibility across a changing business
- Ability to forecast different scenarios
- Key financial information comprehensively reported during restructure
- Key financial information readily available to inform sale of business unit

## Key Outcomes

- Workday Adaptive Planning successfully implemented and rolled out to 60 users in 15 countries using 13 currencies, on time and on budget
- Integrated with FMIS for loading balances, transactions, exchange rates, billing utilisation and personnel data
- One 'constant currency' view of profitability of all business units and countries



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