



“Our ability to analyse data has been enhanced beyond belief”



Ford & Slater Keep on Trucking Performance Management

The Client

Ford & Slater is one of the largest DAF Trucks dealership groups in the UK.

The company operates from 12 dealerships strategically located across the East Midlands and East Anglia.

Ford & Slater was founded in 1928 and since then it has been at the forefront of commercial vehicle distribution. In recent years they have won the prestigious “Motor Dealer of the Year” award and in 2007 the Spalding branch moved into a purpose built dealership.

The Company mission statement is to exceed customer’s expectations by offering high quality transport services in an ethical manner at competitive prices.

They achieve this by effectively utilising the synergies within their dealership group, offering innovative solutions including a “one-stop shop” provided by highly motivated, skilled, long-term employees and reinvesting profits to provide modern, safe premises.

The Challenge

Before implementing CFMS Lite, producing monthly management reporting and consolidating numbers across the 12 dealerships was extremely difficult and time-consuming. Data had to be pulled together from a myriad of spreadsheets, which reflected the diverse nature of the departmental structure found at Ford & Slater and common across the automotive industry.

When it came to budgeting and forecasting this large number of spreadsheets made it almost impossible to create any more than one budget; making changes to the model from a top down perspective was out of the question.

The challenge was to implement a solution which would streamline the process and dramatically reduce the time to produce management reporting and budgeting with ability to move to monthly re-forecasting.

The Approach

CFMS Lite comes with a feature rich Excel integration and data extraction, transform and load (ETL) tools.

The objective was to provide a Group Management reporting solution by dealer and department. The company has got six major departments, New Vehicles sales, Used Vehicle sales, parts, service, body shop, and forecourt.

The approach was to create a CFMS Lite model which reflects the business structure of the organisation. One cube was required for each department and the resulting P&L by department is then "pulled" into a group P&L cube.

Because the dimensional structure is easy to build & maintain with CFMS Lite a dealership dimension can be included in each cube so that a complete dealership P&L can be achieved for each department and the full P&L is always available.

Data is taken from GDMS (Global Dealer Management System) by department and loaded into the CFMS Lite database using the ETL tool.

There is an additional requirement to adjust the actual data after it has been uploaded into the cubes. The use of the multi-dimensionality allows the easy creation of both an adjustments



"CFMS Lite has made significant improvements in the delivery of key company information enabling us to manage the company more effectively..."

Andrew Vickerstaff
Group Financial Controller

version and an adjusted actual version. This provides both for journal entry and a final result without affecting the actuals.

Once the data is loaded into the cubes it can be reported on using Excel based templates which will be automatically updated.

Within the same cubes Budget and forecasting versions can be created. Departmental cube budgets can be set for every account at the total dealership level and these values can be spread based on last year's actuals or any other criteria which makes sense to the business.

This will be extended to forecasting, where it is key to be able to incorporate the correct number of months' of actual numbers in the current forecast. Using CFMS Lite's powerful rules/logic enables the linking of cube data and the extension of the model to become driver based. E.g. Number of vehicles and/or price as a driver enables the flexible modeling of vehicles sales income lines.

The Result

It took Andrew Vickerstaff, as the Group Financial Controller, around 2/3 weeks to produce his annual budget reports. This has been reduced to a couple of days. Where as they really struggled to produce their budget and make amendments to it they can do as many top down adjustments as they need.

Andrew is now a devoted CFMS Lite user and wouldn't be without it.

	Jan	Feb	Mar	1. Qtr	Apr	May	Jun	2. Qtr
Product A	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product B	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product C	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Productgroup1	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product D	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product E	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Product F	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Productgroup2	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Products	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

CFMS Lite uses Excel as its front-end while removing all the limitations of a standard spreadsheet environment.