

UNICA and F.A.C.T.S Partner to implement Outlooksoft 5.0

Introduction

Unica, Inc.
Waltham, MA.

International operations

Software (EMM)
Industry

Over \$100 million in
sales

Unica, Inc (UNCA, Nasdaq) is a leading Enterprise Marketing Management software provider located in Waltham, MA. Enterprise Marketing Management (EMM) helps marketing organizations manage complexity, automate processes, boost productivity, interact with buyers, and ultimately, grow revenue. Their client base extends into many of the Fortune 1000 and non-profit customers. FY2008 Revenue totaled \$121M, 500+ employees.

The Challenges

In late 2006, Unica's Finance organization embarked on a CPM implementation to support their FY08 budgeting and reporting requirements which were then assembled using MS Excel and uploaded to Great Plains (GP). FRx was used internally to report actuals. After a two months selection process, they chose OutlookSoft 5.0 (OLS, now part of SAP) because of its comprehensive Excel-SQL multi-dimensional integration and dynamic reporting capability. They also selected a local implementation partner and began the project in early 2007.

Within a couple of months, several problems arose with the implementation; the implementation partner's lead member had to be replaced, his replacement was not based locally and couldn't be on-site for ongoing development. Although Unica had a PT project manager, implementation was falling further behind, threatening the project's availability for the upcoming Budget preparation.



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We hired Bob to rescue a CPM implementation. He came in on a new technology and quickly assessed the technology, our requirements and current situation. He was able to put us back on track and get us live on a tight timetable. He was a team player, rolled up his sleeves and was great to work with.”

Mike Lemberg,

Former VP – Finance, Unica, Inc.

Solution

Unica called in FACTS to assist with implementation in March 2007. With no OLS domain knowledge, Bob Katz’ knowledge of BPM and financial systems was put to the test to quickly complete the basic design of the financial application while learning the nuances of the application, including account and organization structures development, Within two months, he was able to produce core financial reporting and budgeting capability, reconciled to the GP ledger and existing FRx reports, allowing Unica to dismiss its previous implementation partner.

Bob was then able to add further functionality to include new account rollups and reporting hierarchies to facilitate the introduction of the company’s new business unit structure in time for the Budget process in late summer.

Outcome

Largely due to Bob’s efforts, Unica Finance was able to implement the application to support the organization’s budget timeframe. After moving to a PT status, further report and process build out and providing ongoing application training to new finance team members, Bob was also involved in the direct design of two additional applications, Headcount and Bookings to complete the application core set before finally ceding maintenance responsibility to a newly hired Unica employee and a new OLS certified implementation partner in Sept. 2008

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