

## Using Alight for Budgets & Reporting

### The Company

**Haws Corporation** Founded by Luther Haws 100 years ago, Haws manufactures and markets drinking fountains, HydrationStations and emergency eyewash and shower equipment in the United States and overseas.



**The Voice** Dodi Stout, Finance and Cost Accounting Supervisor

### The Problem

We started budgeting in Excel three years ago. It all fell apart. If a sales manager inserted a row in a worksheet, then it wouldn't tie out with the other worksheets for the rollup. If names of our reps changed or there was new information, a formula would break. Maintenance and version control were a nightmare, plus we weren't getting the information we needed like product or region profitability analysis.

The heart of the problem was revenue and COGS planning. We needed to assimilate information from our rep organizations, scores of companies in the US and overseas, for budgeting sales across 60 products in 10 product lines. We had to juggle the unit volumes and prices by rep, then roll the sales forecast into SKU totals for calculating labor, material and other product costs. 4,000 line items in all. Not an easy job in any application, much less spreadsheets.

### Implementation

It was easy getting into Alight. I connected with the Alight consultant. She had me up and rolling with only 20 hours of support. The setup included importing actuals across the board from our general ledger and product information systems. Our sales managers massaged the inputs from the rep organization right in Alight.

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The expense budgets and rollups to the P&L were seamless. Specific features such as auto-generation of line item names when importing gave us true apples-to-apples comparisons and visibility into trends that we couldn't get in Excel. I could tell right away that the Alight people had thought through a lot of details that counted.

### The Result

We're into our second budget cycle with Alight, and I'm extremely pleased with the result.

Last year, we reported actuals versus plan at the rep/product level, giving us real insight into which organizations were performing and which weren't. Working the channel is an important priority here. The reporting flowed all the way back to the reps themselves, showing them that we were on top of things and giving us greater visibility within their organizations.

In addition, special analysis features in Alight such as dimension filters give us insight into profitability by product and by region which we weren't getting before. Filters are also the basis for ad hoc reporting that lets me look at spending by natural class account across departments (something I could never do easily in Excel) and other "slicing and dicing" of the data.