

# SUCCESS STORY



Mechanical and plant engineering | SAP BW-integrated planning | Rittal GmbH & Co. KG



## **BW-integrated planning instead of Excel: Rittal is transparently planning customer and project sales with IT support**

With a planning solution based on SAP BW Integrated Planning (SAP BW IP) and SAP Lumira 2.0 for the front end, Rittal's Sales Department can plan sales efficiently, transparently, with IT support and at the desired aggregation level. Thanks to in-depth target/actual comparisons, deviations can be identified immediately and countermeasures can be taken without delay. The solution forms an integral part of Rittal's Digital Sales Excellence strategy in sales.



# BW-integrated planning instead of Excel: Rittal is transparently planning customer and project sales with IT support

Rittal, a Friedhelm Loh Group company, owes its success on the market to the development of innovative products in the control cabinets, power distribution, air conditioning and IT infrastructure segments, together with the corresponding software.

## Rittal's digitalization strategy

The company is meeting the challenges of the digital transformation and the associated agility and flexibility requirements with a digitalization strategy that aims to automate and network process chains and thus shorten throughput times. It is based on an integrated IT landscape with SAP ERP at its core, SAP Business Warehouse (SAP BW) for data analysis and SAP-based Industry 4.0 solutions from ORBIS for production and intralogistics.

### Rittal GmbH & Co. KG

Head office: Herborn, Hesse

Products: Control cabinets, power distribution, air conditioning, IT infrastructure, software and service

Sites: 13 production sites worldwide

Number of employees: 9,300 worldwide

Website: [www.rittal.com](http://www.rittal.com)

## IT-supported sales planning in Sales

Agile digital and mobile processes are also extremely important in sales, especially for the field sales force. An important building block for a high level of efficiency in Sales is annual sales planning. "By introducing an integrated planning application based on SAP, we have taken another important step forward on our path to digitalizing processes in Sales," commented Lukas Schulte, Business Development Manager at Rittal. Now, planning for the following year can be consistently IT-supported, standardized throughout the company and therefore carried out with even greater transparency.

"The new planning tool uses the functions of SAP BW Integrated Planning (SAP BW IP) and, thanks to SAP Lumira 2.0, features a user-friendly input interface in Rittal's corporate design," Mr. Schulte pointed out. The tool was developed in close cooperation with Saarbrücken-based ORBIS AG, which is also responsible for the application's implementation and rollout and created the necessary data model including queries for data queries in SAP BW. ORBIS has already successfully

implemented projects at Rittal in the SAP environment for planning and consolidation purposes, not to mention in intralogistics and on the shop floor too.

## Workflow-supported planning process

The planning application, which is fully integrated in SAP BW, is used internationally at Rittal. The benefits of IT-supported sales planning became apparent shortly after going live. The software enables an end-to-end planning process, in which the various user levels have live access to all planning data. SAP BW IP automatically distributes the planning data to the responsible user levels using the workflow.

Additionally, before starting a planning cycle, an algorithm segments the planning data in question into different categories. The relevant key performance indicators and the desired aggregation levels are selected with a click of the mouse in the navigation area.

"To make users' work easier, necessary planning data is determined by means of retrograde calculation. These figures form the basis of our planning activities," explained Ina Hanel, a BI specialist who works for the Friedhelm Loh Group. Certain values and subtotals can be shown or hidden as required at the touch of a button. Target figures entered or changed at any level of aggregation are automatically distributed top-down to the level in excellent detail.



## In-depth target/actual comparisons

There are several planning versions that reflect the different distribution levels at Rittal. From an organizational perspective, annual planning is therefore split into various subcycles. In practice, this means that

the first planning cycle is carried out first of all. As soon as this is finished, the data is frozen as part of a freeze process and, at the same time, copied as preset values to the plan version for the next cycle. The next subplanning process is then carried out on this basis.



The freeze process also allows us to compare individual plan versions and creates a great deal of transparency, since every change to the original plan is completely traceable. It also enables effective and in-depth target/actual reporting of forecast, target and actual sales figures at a wide variety of levels. "This enables us to identify deviations promptly and close target gaps between current sales and target and forecast figures without delay," explained Simon Stark, Assistant to the Sales (Europe) Business Unit Manager at Rittal. Using trend arrows in the traffic light colors green and red, users can immediately see where there is a target/actual deviation and identify the type of deviation.

### Simple operation thanks to planning grid too

Since the BI tool integrates seamlessly into Rittal's SAP landscape, the result of the sales planning could be integrated into various SAP systems at Rittal in the required form and detail, and also made available to Controlling for planning using SAP BW. Controllers can then evaluate the planned and forecast figures according to their own criteria.

"Users appreciate the intuitive user guidance in the front end, which also includes interactive BW IP functions to update or reset data, for example," clarified Mr. Stark. New projects are planned in a grid, the structure of which is built automatically as soon as the necessary

information is entered. Lead and project data from the CRM system used can be used too.

### Administrator Cockpit as a control center

One highlight of the planning application is an innovative Administrator Cockpit that acts as a control center. This is where power users from the specialist department and BW administrators from the IT organization maintain and manage all the key performance indicators that are relevant for planning: basic parameters such as various calculation logics, the planners' work baskets in case of absence, master data, as well as users' assignment to various planning roles. Preparatory steps such as loading current sales or deleting log files are also carried out in the Cockpit.

Mr. Schulte summed up the situation positively: *"The sales planning solution integrated into SAP BW is another step towards digitalizing processes in Sales."*



*Simon Stark, Assistant Business Unit Sales Europe & Service International, Rittal  
Lukas Schulte, International Sales Processes, Rittal*

Thanks to the cooperative partnership between the project team at Rittal and the experts at ORBIS, who adhered precisely to the agreed milestones and implemented additional requirements in a timely fashion, the implementation process was quickly complete.



## SUCCESS STORY

Mechanical and plant engineering  
SAP BW-integrated planning  
Rittal GmbH & Co. KG

## Contact



### **ORBIS AG**

Nell-Breuning-Allee 3-5  
66115 Saarbrücken

Tel.: +49 (0)6 81/99 24-0  
Fax: +49 (0)6 81/99 24-222

Internet: [www.orbis.de](http://www.orbis.de)  
eMail: [info@orbis.de](mailto:info@orbis.de)

Photos: © Rittal GmbH & Co. KG

Gold  
Microsoft Partner

