



**CALIDA** relies on **Advanced Planning & Analytics** to control integrated omnichannel processes



## **The company: CALIDA**

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LEGENDARY QUALITY.

ULTIMATE COMFORT.

AND SUSTAINABLE BEFORE IT WAS COOL.

SINCE 1941.

Swiss at heart, with a view to the world and regard for nature: CALIDA is an international brand, born in Switzerland and known worldwide for quality, innovation, modernity, and sustainability. For generations, CALIDA has been known for the uncompromising comfort and durability of its products. We want to continue to live up to this claim in the future. With the best clothing for every day and every night. For him and her. For big and small. Anyone who wears CALIDA once will remain convinced – for a lifetime.

## The challenge

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### **Omnichannel business model drives complexity and requires additional end-to-end process and system integration**

In recent years, CALIDA has invested heavily in the expansion of e-commerce, cultivated areas of upscale wholesale, and invested in the further digitalization of its own retail. As a result, sales potential was increased and the company's market position expanded further – however, this was accompanied by a significant increase in the complexity of the system environment. At the same time, this omnichannel business model requires particularly efficient and effective management of the goods and financial flows in order to be able to successfully increase potential.

A success factor is uniform data models and key figures across all systems – harmonization of the growing number of fragmented micro-services in the omnichannel environment, such as the Webshop and POS solutions, is an increasingly complex challenge.





This also applies to the consolidation of cross-border business units and offices. The basis has to be integrated data marts, which allow even more complex analyses to be performed quickly and without major project work.

In addition, increasingly last-minute, but also channel-specific customer requirements pose considerable challenges to business planning and, above all, to product planning. Success drivers here are end-to-end integrated planning processes and systems, which on the one hand enable a channel-specific bottom-up perspective, but on the other hand also always maintain a holistic strategic top-down view – with the corresponding high technical but not least also purely organizational complexity. It is therefore important to ensure a practical, flexible level of integration and not create too many dependencies.

At the same time, flexible and user-oriented self-service solutions are needed to be able to quickly create customized and business-oriented analyses and plans – without excessive investment in lengthy projects and internal or external IT resources.

## The solution

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### Development of a business and self-service oriented, scalable, and end-to-end integrated analysis and planning solution

The implemented analytics and planning architecture and processes are characterized by great business and user orientation:

- Clear business focus based on a uniform and consistent evaluation system
- Workflow-based planning processes and
- depiction of historicizable freeze points
- Variable (DIS) aggregation along strategic channel and customer segmentation
- User-specific orientation thanks to functional
- and flexible self-service architecture
- Agile product development due to great automation of data processing

- Intuitive visualization of clear management dashboards

At the same time, technical efforts for enhancement and maintenance can be reduced significantly with the use of state-of-the-art technologies:

- Advanced analytics: IBM Cognos Analytics
- In-memory planning: IBM Planning Analytics (TM1)
- Data storage: Microsoft SQL Server Enterprise Edition
- DWH automation by a DWH generator
- Business Intelligence Markup Language (Biml)



## The implementation

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### **Long-term focus with agile product development and excellent cooperation**

The successful collaboration between CALIDA and valantic began in the first quarter of 2019 as part of the pitch for implementing a new analytics and planning solution. „We chose valantic as an implementation partner because we were convinced by both their process consulting expertise and basic technical know-how in the IBM environment,“ said Tietje Voss, Director Operations & IT. The cooperation was very intensive over the project period of about 2 years, since on the one hand a fragmented existing system had to be replaced, and on the other hand integrated processes that had not yet existed had to be established. However, significant joint successes were achieved after just a few weeks, which established a strong basis for trust for further cooperation.

### **Data warehouse automation as a future-oriented technical basis and harmonization of business-oriented KPIs as a strategic success driver**

The basis is an Enterprise Data Warehouse (EDWH), an automation tool and BIML as a staging tool, which takes over the data load from different sources into the EDWH. However, the primary focus of the project was the harmonization of a company-wide KPI system of more than 50 operational and strategic KPIs for the planning and management of business operations. These can be clearly identified at any time by means of a prefix. In addition, the attributes are now standardized across all business units. In addition to the more fixed KPIs such as manufacturing costs, the coordination of these KPIs was not always trivial, particularly



in the omnichannel environment – each sales channel often uses different sales variants and channel-specific measures such as conversion rate. Based on this definition and the necessary linking of the source systems, all results are now transferred automatically to the EDWH and are available to the key users flexibly and according to the defined use cases. Relevant reports are sent automatically via the new platform and the key users can make changes to reports and dashboards independently; programming knowledge is no longer required. At present, a total of six key users have been defined at CALIDA; this way, they can implement requirements quickly and efficiently without having to go through IT. A regular Business Intelligence Competence Center ensures continuous and agile development.

### **Financial sales planning based on harmonized channel and customer segmentation for efficient coordination of top-down and bottom-up planning**

After implementing IBM Cognos Analytics, some of the planning processes were developed anew in a second project phase and were centrally mapped for the first time in the IBM Planning Analytics planning tool. In conjunction with IBM Cognos Analytics, consistent plan/actual deviation analyses are possible in the long term, facilitating strategic control of all sales channels and corresponding follow-up processes. „Just like the standardization of the KPIs and attributes, the central challenge was the basic work for defining the planning hierarchies and parameters, with the fragmented systems and different stakeholders,“ Voss recalls. As a result, the planning was strategically consolidated and disaggregated to the last operating unit. On the basis of these different aggregation levels, the planning can also be prepared according to the requirements of the subsequent





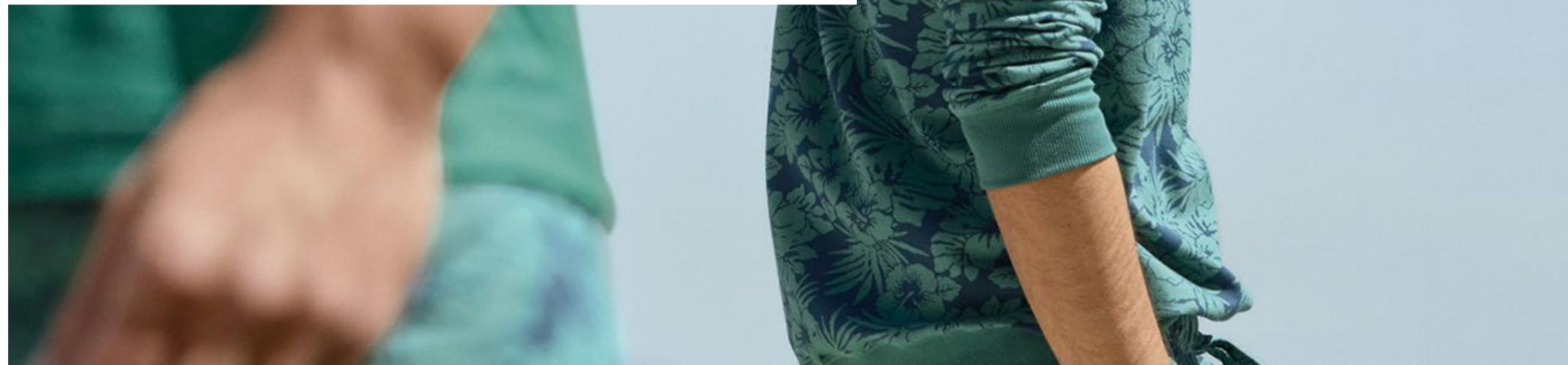
processes, such as production or capacity planning, and used in a standardized manner for the first time. At the same time, it was ensured that the different freeze points can be set along with the annual financial planning and that the plans can also be historicized to this extent and used as a starting point for future planning variants. This creates the basis for a driver-based learning system, which in a further expansion stage can generate proposals for the development of the company KPIs based on defined scenarios.

IBM Planning Analytics, based on TM1, is a market-leading enterprise planning solution that enables collaborative planning, budgeting, and predictive modeling and is scalable as you want. TM1 is a high-performance in-memory database that allows an unlimited number of „what-if scenarios.“ In this way, the effects of decisions can be analyzed and simulated before they are finally implemented. „Sandboxing“ can be used to simulate any number of variants in order to be able to make the best strategic decision. This effectively overcomes the limitations of manual planning. As a fully integrated planning solution from strategic planning to tactical and operational planning, Planning Analytics helps to eliminate isolated planning “islands” and network all business processes.

**Agile and continuous development based on close and trusting cooperation – without losing sight of the long-term goal**

„The joint project with CALIDA is characterized by a close, trusting, and constructive cooperation that has brought all project participants joy. I have perceived the feedback as very appreciative,“ emphasizes Marc Philipp, Managing Director and Managing Director of valantic Business Analytics Swiss AG. Initially, CALIDA and valantic focused on optimizing the analyses. The aim was then to increase the accuracy and transparency of the planning processes and to provide them with a transparent planning calendar and responsibilities.

„In principle, such a project has never been completed all the way, because there are always new ideas,“ explains Philipp. A major advantage of the new solution implemented with valantic is also that CALIDA can make changes to its own work, for example via simple configuration tables and updates. After completion of the two sub-projects for the introduction of IBM Cognos Analytics and IBM Planning Analytics, further optimization will be the focus in the long term, especially in the end customer, production, and logistics environments. Especially when conceiving and defining the data sources for these optimizations, CALIDA will certainly continue to draw on valantic’s knowledge and expertise.





**„The implementation of the initial project and also the following operational cooperation is always open, goal-oriented and extremely professional, even in intensive project phases“**

Tietje Voss  
Director Operations & IT at CALIDA

**„The joint project with CALIDA is a close, trusting, and constructive cooperation at eye level“**

Marc Philipp  
Managing Director at valantic Business Analytics Swiss



## Über valantic

valantic Business Analytics (valantic BA) is part of the valantic Group ([www.valantic.com](http://www.valantic.com)). We advise companies on the introduction and implementation of digitalization strategies, and we are proven specialists for solutions for corporate management (business analytics, connected planning, Big Data, data warehousing, predictive analytics). For more than two decades, we have been a successful, trusted partner to our customers (including companies in the pharmaceutical, retail, and producing industries, banks, and insurance companies).

valantic is a market leader in the digital transformation and one of the best digital solutions, consulting, and software companies around the world, with more than 1,200 developers and consultants worldwide.

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