

Constructing a Robust Planning Process

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Guy Williams – Chief Financial Officer, Juniper Group

When one of Australia's most successful property development companies embarked on the multi-million dollar development of Soul on the Gold Coast – a 77-level sculptured residential tower - it was critical to ensure that the financial foundations of the project were as solid as the foundations of the building itself. This required the development of a robust Planning process to support the financial structure of the project.

Recognising the inefficiencies and inflexibility within the existing Excel-based Job Costing and P&L Planning process, Guy Williams, the Chief Financial Officer at Juniper, set out to find a solution that could improve upon the current process. As Williams explains, **“data consistency is very important to us in all reporting and budgeting. We needed reports to be created from the one consolidated data location rather than rely on manually created spreadsheets from disparate data systems with the inherent possibility of errors and timing issues. We were also looking to standardise our quarterly forecasting system.”**

Having worked with Bistech in the past, Juniper again chose to partner with the Performance Management experts to jointly implement a refined Planning solution. Engaging with Juniper under a guidance model, Bistech undertook the key scope and design tasks, while Juniper undertook the majority of the build tasks. Additionally, Bistech provided training

to key Juniper personnel and undertook regular quality assurance checks throughout the implementation period.

The final solution has provided Juniper with significant improvements, and Williams is happy to convey that **“we have moved a long way towards our goal of replacing manually created reports with systems in place to provide automated consolidated reporting from our various data sources. We have implemented a standardised budget entry system across all company divisions, removing previous inconsistencies and associated user issues.”**

When asked to quantify the return on investment provided by the new and improved solution, Williams explains that **“the standardised quarterly rolling forecast budget entry procedure has been wholeheartedly accepted by all users. Ease of use and access to relevant data has substantially reduced the time required by department managers and their staff to complete this process and increased the accuracy of forecasting.”**

Moving forward, Williams has already identified further opportunities to advance this initiative, adding that **“the procedures adopted to streamline the quarterly forecasting process will be further adapted to standardise a wide variety of regular monthly reporting, again with the aim of consistency and accuracy across all reports.”**

The Problem

Inefficient and inflexible Microsoft Excel based Job Costing and P&L Planning process

The Solution

Bistech architected Enterprise Planning solution

The Benefits

Easier, more efficient and more accurate budgeting and forecasting process



The Juniper Group is one of Australia's leading private property development companies, achieving success through its core business of conceptualising, developing, marketing & constructing projects of international calibre in some of Australia's most sought after locations

“Juniper has worked with Bistech for a number of years and we are continually impressed with the quality of service, advice and innovation that they bring to the table - they have truly partnered with us to assist us achieve our Performance Management needs”
Guy Williams – Juniper Group