

# Oil & Gas Case Study

## Complex financial management simplified for Global Marketing

November 2009

The challenge for this oil and gas company was to track marketing budgets and spend globally, while ensuring campaigns were run efficiently with a disciplined and unified approach.

### Background

#### A Major Global Brand

This global oil and gas company is one of the 10 largest companies in the world with one of the most trusted and recognised brands to match. It is also the largest retailer in the world by presence, with over 40,000 outlets and 200 million customers worldwide.

#### Marketing Complexity

The geographical expanse of the company's business creates huge marketing complexity as campaigns and budgets are managed across a matrix of regions and retail businesses. 'Centres of excellence' drive marketing strategy while local teams execute marketing initiatives across various categories (such as forecourt/pump, convenience retailing and fuel).

### Business Challenge

#### A Change in Management Strategy

To add to the above challenges, the company decided to shift from a centralised to a decentralised marketing operation resulting in a need to empower local management while achieving an efficient way to view marketing activities and budgets across the globe in real time.

#### Marketing Wastage and Poor Visibility

Prior to implementing Orbis' flagship software, Orbis Marketing™, the company had managed its global marketing planning and budgeting processes via hundreds of spreadsheets and thousands of hand-crafted emails each month. The manual process created massive wastage and inefficiency: it would take up to 3 weeks for the head of marketing to get a global view of marketing activities and funds status, by which time the data had lost decision-making usefulness. The compilation cost hundreds of hours per month of local marketers' time, time that could be spent on productive marketing effort.

### Solution

#### Online, Real-time

The Company partnered with Orbis to deliver an online solution covering Planning and Budgeting through the use of powerful Calendar and Budget views supporting detailed reporting, business rules management, user security and permission controls across complex business hierarchies.

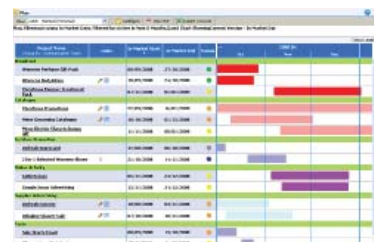
#### Standardised across the Globe

Orbis Marketing now provides a unified marketing management solution for hundreds of marketers to easily track current detailed planning and financials right down to commitments and spend. The Vice President of Marketing has a

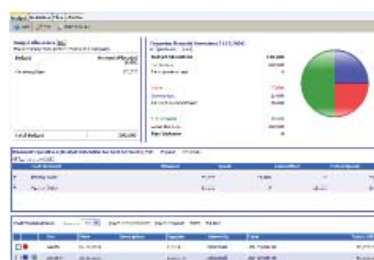
*"Picture a simple to use, low maintenance application that always has up to date information on your campaign budgets, and is also a "one stop shop" for other critical campaign information".*

**Manager, Strategy & Integration**

Calendar View



Campaign Budget View



*“The Orbis Marketing™ solution is a critical enabler, ensuring continued transparency and performance assessment.”*

VP Marketing

## KEY FACTS

- One system 500+ users across 50+ countries.
- Eliminated hundreds of budget and planning spreadsheets
- Productivity savings of 1000's of hours per month.

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centralised access point for a view of financials across the globe so it isn't necessary to send emails asking for plans or budget spend across regions and then wait days or weeks for the request to be fulfilled. Today the information is on-hand and the company is empowered to act fast when needing to change marketing programs or strategic direction.

The Orbis Marketing solution is a robust enterprise-wide solution. It comes with built-in business rules and approvals management functions which protect the integrity of the company's data from any unilateral changes at country level. Baseline calendar views provide them with variances across 'planned versus actual' activities enabling up-to-the minute and dollar accurate information about execution activities across the globe.

## Benefits

### Efficiency and the Right Work Focus

The company now has a standardised, real-time, and reliable source of all marketing activity across the globe. Local marketing teams are more efficient and effective in driving sales. Their energies are more focused on campaign implementation rather than administration and reporting.

### Standard Terms, Automatic Calculations and Rules

Recent upgrades to the Orbis Marketing solution come with an enhanced budget tracking tool that automatically calculates latest estimates by country, region or global level. In addition, there is global consistency in use of budgeting and finance terms, so no mistakes are made when marketing needs to answer finance-related questions. A budget summary screen now provides financial details on a global, region, country and campaign level and this is helping to reduce the number of requests for such information. Importantly, there is no need for individual spreadsheets as the Orbis Marketing system automatically calculates actual, planned, latest estimates and (un)committed amounts. This now allows Marketing to manage expenditure and ensure it is used for most effective activities.

### Easier Results Tracking and Post Implementation Learnings

Enhanced Calendar functionality with sorting and reporting capabilities helps marketers better track campaign results and thus improve future marketing campaign tactics. In addition, Orbis Marketing now allows for easy storage of post campaign reviews, thereby increasing visibility of best practices and sharing results across regions.

### Effective Enablement of a New Approach to Marketing

Ultimately, the Orbis Marketing solution provides a simplified approach to a complex process, thereby enabling the company to save thousands of hours per month. Above all, decision-making is better informed and timely.

The solution encourages local responsiveness and accountability, helps management operate in a consistent way, and enables Marketing to leverage best practices across the globe.

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