

Complex structures mastered precisely with Unit4 FP&A



pme Familienservice GmbH



The pme Familienservice Group has been using Unit4 since 2017. As Germany’s largest all-in-one Employee Assistance Program (EAP) provider, pme achieves over €100 million in group turnover. Sascha Ehlert, Head of Controlling, summarizes: “The absolute strength of the Unit4 solution lies in its ability to accurately depict individual corporate structures through the flexibility of FP&A.” pme transitioned from Excel-based legacy systems to Unit4 FP&A. “With that, data silos, waiting queues, and other uncertainties became a thing of the past,” explains Sascha.

- Self-service. Changes can be made independently at any time
- Flexible, scalable, intuitively operable
- Accurately maps individual structures
- Easy implementation in subsidiaries and adaptation to complex corporate structures
- Time savings, accelerated processes, rapid response times
- “Golden record of the truth”

‘Innovation is a prerequisite for a company of this size and complexity’

pme Familienservice is the leading player in the healthcare and social sector, in Germany providing all-in-one services for work-life balance. More than 1,400 employers trust pme, which employs over 2,000 staff to provide consultation, organize more than 90 childcare and educational facilities, offer support through the Homecare-Eldercare service, and conduct more than 2,000 seminars, coaching sessions, and webinars annually. Some of these are record-breaking, such as the 60,000 participants in a digital event featuring Sven Hannawald. When Sascha Ehlert assumed the role of Head of Controlling in 2019, he encountered an inherently innovative company. For instance, pme

Industry

Health Services

Location

Headquarters in Berlin; more than 70 locations across Germany, Austria, Switzerland, and the Czech Republic

Size

2,000 employees, 100 million euros group turnover

Product

Unit4 Financial Planning and Analysis (FP&A)

Challenges

Transition from mostly Excel-based legacy systems for finance and planning — which were burdened by data silos and uncertainties — to Unit4 FP&A, the single source of truth for planning, budgeting, finance, and analysis in a diverse, rapidly growing, and personnel-intensive corporate group.

Key metrics

1 day

AGILITY

Reduction of response time from 3 days to 1 day



SELF-SERVICE

Easy self-service adaptation with minimal training effort

“Unit4 FP&A also accurately represents individual and highly complex corporate structures.”

Sascha Ehlert

Head of Controlling, pme Familienservice GmbH

introduced the first 24/7 EAP service line in 1998 and, in partnership with Commerzbank, the first app-based online childcare service in 1999. Innovation is promoted by pme management through four in-house IT departments and even an “Innovation Future” cost center. Sascha remarks, “This could represent a unique feature for the social sector.”

‘Our customers perceive pme as a responsible company.’

The group’s success for over 30 years is rooted in the knowledge of delivering valuable work. Sascha explains, “Our mission is the healthy balance between work and private life.” To achieve this, pme offers diverse services for every life and job situation. Sascha adds, “We are a company that truly cares. This benefits not only the employees of our customers, but also the employers. Our customers are seen as particularly responsible companies.” The complexity of the personnel-intensive services and the group’s strong growth require cutting-edge solutions in controlling, finance, and human resources.

‘pme needed a solution that we could tailor precisely.’

In 2017, Unit4 FP&A (then known as “Prevero”) was introduced at pme. Sascha reflects, “What convinced us about Unit4 was the fact that we could make changes ourselves at any time, operate independently, possess the knowledge in-house,

and generate precise evaluations for our very dynamic and complex business areas. Self-service is highly valued by us.” He highlights the intuitive usability: “For example, we’ve stored all invoice outputs in FP&A. When you see a turnover figure, you can directly access the outgoing invoice through the document link, saving you the detour through the ERP system. The intuitive operation and the fact that we have complete control convinced us. At the beginning, we were closely guided; today, we practically handle everything ourselves, from adjustments to updates.”

Regarding budget planning, Sascha explains, “We manage our entire budget planning through Unit4 FP&A. Personnel costs account for 74% of our cost structure. Thus, our workforce planning is highly complex. It’s all the more important to depict everything with extreme precision. With FP&A, we were able to set up a dedicated worksheet for this purpose. The budget sheet consolidates the sub-plans for investment, occupancy, and workforce planning. The different detailed plans work harmoniously together. Our monthly reporting even includes a quality management process indicator. Internally, we use a traffic light system. If the result deviates significantly from the budget and triggers a red light, that cost center’s financial statement must be commented on. At least 90% of all red lights must have explanations.”

Controlling works closely with finance and HR, Sascha says, “Let’s take payroll accounting. This involves highly complex processes.

When payroll data from DATEV is imported into FP&A, we require and see a maximum level of detail, including wage type, inflation compensation premiums, special payments, voluntary allowances, and so on. To depict all wage types in detail, we need a close connection between departments. For depicting the payroll booking proofs in FP&A, we have designed worksheets that allow each location to see planned and actual values per employee in maximum detail per wage type. This provides us with significant time savings. We can start from the large financial statement that shows salaries, go down to the employee level, and immediately see if something is going awry. In workforce planning, we can see the comments per employee and understand the source of deviations.”

Cost allocation and internal invoicing are also important for pme. In close collaboration with municipalities, it’s essential to allocate and document central costs in detail. Sascha says, “The level of detail allows us to always demonstrate costs in detail according to the order.”

Approximately 250 users in total work with Unit4 FP&A at pme.

‘Accelerated processes, maximum time savings, a great basis for decisions.’

pme benefits from accelerated processes, significant time savings, and a secure data foundation for decision-making with Unit4. “The multidimensionality and rapid ad

“What convinced us about Unit4 was the fact that we could make changes ourselves at any time, operate independently, possess the knowledge in-house, and generate precise evaluations for our very dynamic and complex business areas.”

Sascha Ehlert

Head of Controlling, pme Familienservice GmbH

hoc evaluations of Unit4 are a big asset for us. When we receive a query, we know we can provide the answer immediately or within a day, avoiding the three-day effort we had before. This speed also increases employee satisfaction.,” Sascha says. “In our satisfaction survey, we ask employees about our response times. Everyone clicks the maximum option: very satisfied! It’s a good feeling to know that our work is appreciated.”

‘We used to need multiple emails. This ping-pong is history now.’

Satisfaction also comes from the assurance of standing on solid ground. Sascha, on the topic of emails: “In the past, emails were exchanged for reports among all parties involved. This error-prone ping-pong is now history. Everyone has their online access, which brings us considerable time savings. Through commentary in the financial statement, we are building new expertise. Even if it’s created decentrally, I can go to the respective month in controlling and see commented deviations. In the past, you would have needed multiple emails for that. Now, everyone sees the same thing. Everyone has the same definition of our traffic light. Everyone

understands the process indicator. That’s why Unit4 FP&A is the exact solution that propels us forward.”

‘Unit4 FP&A gives us time for higher-value tasks.’

pme manages thousands of its own employees and coordinates a multitude of external company contracts and individuals, ranging from individual consultants to public daycares. Evaluations related to personnel were a challenging matter before Unit4. Sascha states, “With Unit4, this complex data received a structure — right from the beginning. The system was immediately tailored to our needs. All business areas benefit from this. We don’t waste time on data preparation. Instead, we gain time for analysis and can derive actions more quickly. Moreover, there is trust in the data, its plausibility, and accuracy, creating a secure single point of truth. With Unit4 FP&A, we have significantly more time for higher-value activities.”

‘Unit4 FP&A also suits our subsidiaries — and they’re growing steadily.’

Sascha says he is pleased with the strong growth of the group. “The easy implementation of Unit4 FP&A has a positive impact

on our business growth, as integrating new subsidiaries into FP&A works seamlessly. As soon as the accounting is reflected in DATEV, which is the case with our subsidiaries, we can simply integrate them into our SX Integrator and provide the data in FP&A. The cost centers are appropriately defined in our dimension trees. This works seamlessly. Even the system update was only done once with guidance from Unit4— since then, we’ve been handling it in-house on an annual basis.”

