

# CASE STUDY

CLIENT: Catering industries

INDUSTRY: Hospitality

LOCATION: Australia

PRODUCT SUITE: EXO Business

MYOB ENTERPRISE PARTNER: Kilimanjaro

Catering provider finds a system with the flexibility to keep track of financials across 75 sites and three states.

## Overview

Catering Industries is one of Australia's largest contract catering providers for aged care, education and business. Set up in 1977, the business counts some of the country's most recognisable organisations amongst its clients.

Today, Catering Industries has over 700 employees across 75 sites in New South Wales, the ACT and Victoria. For a business of that breadth, staying on top of the financials is a constant task, and one that requires the right software.

## Outgrowing the system

For the best part of 10 years, Catering Industries was using MYOB Premier.

"It was a good solid system," says Sharon Blundell, Management Accountant at the company, "particularly in the beginning.

"We especially liked the fact you could delete incorrect entries or change detail. But as time went by, it just couldn't cope with the sheer volume of transactions we were trying to put through it, or the number of users."

Blundell says Premier also couldn't export to an Excel pivot table – a feature in Microsoft Excel that allows you to analyse, explore, and present data. And that was something Catering Industries needed it to do.

So they started looking at replacements.

## Finding the right partner

The company spent three months looking at other products.

"At one point we were considering Great Plains," she says, "but it just didn't feel right. So we called MYOB to find out what other products they had".

MYOB suggested Catering Industries look at EXO and put them in touch with local implementation partner Kilimanjaro.

"It's fair to say Kilimanjaro were wholly influential in our decision to go with EXO," says Blundell.

"Even though we were already keen on sticking with MYOB, it was Kilimanjaro's thorough analysis of our business, and their clear belief that they could tailor EXO to meet our needs that really sealed the deal."

## Prepping for success

When it came to scoping out the project, Kilimanjaro documented the approach in a detailed flowchart.

"In the very early stages of any project, we conduct a detailed review of our client's business to make sure we properly understand their requirements.

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It's essential to document this in full and discuss it before a single line of code is written," says Ronnie Baskind, Managing Director of Kilimanjaro.

"We found the process very involved," says Blundell, "and there was a lot of work on my part".

But by launch day, the implementation had gone so well that Catering Industries didn't even keep the old system running in the background in case of problems.

"Kilimanjaro had been so thorough – not just in setting up the system, but in training us how to use it – that we were confident it would all go smoothly," Blundell comments.

And it did.

## Creating the right recipe

Catering Industries uses EXO's branch-based general ledger structure to run profit and loss on each of their 75 sites. But to tailor the way they see their information, they wanted several changes made.

"To keep things familiar, we designed Catering Industries' profit and loss reports to mimic the Excel reports the company was used to," says Baskind.

These were built using SQL server reporting services, allowing site managers to view information on the sites they were responsible for via a secure web interface.

In addition, Kilimanjaro extended the scope of EXO's general ledger, so that it would include not only monetary budgets but quantity-based budgets too.

## Saving countless hours

Kilimanjaro also made adjustments in EXO to allow Catering Industries to include both posted and unposted general ledger transactions in the profit and loss reports. This means each site can close their month end at different times.

Without this functionality, the company wouldn't have been able to run reports until every one of its 75 sites had posted to general ledger – a process that would have taken ages.

Pivot tables were something Catering Industries had wanted to export to back in the Premier days. Now,

by linking Excel directly to EXO's SQL database, it is possible for the company to run session and exception reports as live feeds.

According to Baskind, "This means errors can be identified as soon as they've been keyed in – which is invaluable for Catering Industries' audit trail."

## Living with EXO, day to day

On the customisation, Blundell says she couldn't fault the support they received in developing reports.

"Kilimanjaro have been excellent at all stages," she says, "but on an ongoing basis, we really haven't needed much help".

"From our point of view," says Baskind, "Catering Industries adapted very quickly to EXO – picking up all the concepts with ease".

"A lot of this has to do with having a good internal project champion like Sharon to take ownership of the project. Sure, it's a bit of extra work for her, but the benefit to the business is clear."

## A system for the future

Blundell says the best thing about EXO is the ability to customise it.

"Pivot tables were a big thing for us, and EXO lets us connect to the database and extract information to run reports in Excel easily."

In other words, it lets Catering Industries get on with business their own way.

Whether or not EXO has given them better visibility on costs, Blundell's not so sure.

"Our accounting is simple and we've always known our costs. What EXO has done though, is make it quicker and easier to extract and analyse those costs – and that has saved countless hours, particularly at month end."

"In the short term, that might save us the cost of a few extra staff. But the bigger picture is the more important one.

"With a system like EXO, we don't have to worry about outgrowing it. It should be able to accommodate our business for years to come."

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## Client and Enterprise partner details

[www.cateringindustries.com.au](http://www.cateringindustries.com.au)

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