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CASE STUDY

Cafico International

Accelerating Financial Reporting with Solver CPM



Cafico International

Transforming Finance with CPM

With offices in Dublin, London, and Luxembourg, Cafico International is a leading provider of trust and corporate services to over 300 clients across a wide range of industries including financial services, technology, pharmaceutical, communications, and aircraft leasing. Providing local expertise with a global focus, Cafico International strives for efficiency and standardisation across the business in order to deliver the highest standards of service to its clients.

Modernising Financial Reporting

Having previously undergone a significant digital transformation with Business Central, Cafico International required advanced automation and standardisation capabilities to support complex reporting processes across multiple entities and currencies.

Fully customised reporting was complex and time-consuming, often requiring manual exports and imports. This reliance on manual, Excel-based reporting often made month-end processes cumbersome. Additionally, a growing client base and expanding international footprint meant that Cafico International needed a solution that could scale efficiently and support evolving business needs.

Based on these requirements, Cafico International sought to implement a scalable modern reporting tool that would help the business standardise the reporting process, while providing a degree of flexibility to customise reports as needed. Additionally, the business required a tool that would integrate well with its existing Business Central solution.

Having previously worked with Storm Technology to successfully implement D365 Business Central, Cafico International engaged with Storm to identify Solver as the solution. A corporate performance management (CPM) tool that offers native integration with Business

Central to provide enhanced reporting, consolidation, dashboards, and budgeting through a familiar Excel interface.

Fostering Self-Sufficiency

Storm and Cafico International met to discuss the business' specific reporting processes and requirements to ensure the Solver reports would be fully aligned with the organisation's needs. Storm then provided user training to ensure employees would have the knowledge and skills needed to build out their own custom reports. This helped Cafico International ensure maximum user adoption and ultimately get the most value from its technology investment. Speaking on the training stream of the project, Sinéad Treacy, Client Manager and Financial Accountant at Cafico International, commented; *"The team at Storm taught us the foundations of how to create reports from scratch. Not only that, but we really got into the engine room of Solver to see how it operates, how to pull data into reports, how to categorise data, and how to troubleshoot when you have issues. Having built this level of knowledge on Solver, our team is now empowered to build and edit reports themselves and use the solution to its full potential."*

Streamlining Complex Reporting

Through the introduction of Solver, Cafico International has realised significant operational benefits. From an internal perspective, the business has been able to create a customised management accounts pack to consolidate data from across multiple entities and currencies. *"With Solver we are now able to produce the Cafico International internal finance management account pack with the click of a button, allowing us to save at least a day or two per month. Overall, it's a much smoother month-end process for the internal finance team,"* commented Sean Looby, Head of Operations at Cafico International.

On the client accountancy side, the team now uses Solver for reporting, with the solution allowing the team to create a suite of custom standardised reports for P&L, trial balance, balance sheets, and general ledger entries. This has helped the team accelerate its monthly reporting processes and the delivery of management account packs to clients, a



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Sean Looby,
Head of Operations,
Cafico International

AT A GLANCE

Client:
Cafico International

Industry:
Financial Services

of Employees:
51-200

Business Challenge:

- ▶ Managing complex reporting processes across multiple entities and currencies.
- ▶ Reliance on overly-manual, legacy-based reporting processes.
- ▶ Standardisation and customisation of financial reports.

Services / Solution Overview

- ▶ Solver CPM

Benefits Realised

- ▶ Unlocked time savings of 1-2 days per month by automating the generation of internal financial management account packs.
- ▶ Deeper business insight with access to bespoke reports that can be run by dimensions configured in Business Central.
- ▶ Reduced manual effort and enhanced efficiency.

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significant benefit for a team that often deals with tight deadlines.

Solver has also enabled the creation of a custom management account reporting pack on the financial services side of the business, meaning the financial services team can now run their reports and consolidate their pack without having to extract data from Excel, creating a much smoother and efficient process. The team has also been able to build bespoke reports that can be run by dimensions configured in Business Central.

Overall, Solver now provides the ability to create standardised, bespoke management account packs for both internal finance and client accountancy teams, reducing manual effort, enhancing efficiency, and accelerating reporting. The automated reporting and standardised templates mean the organisation doesn't have to rely on individual staff with specialised skills to create reports. The flexibility of the solution allows Cafico International to onboard new clients and entities smoothly, ensuring the business can scale its reporting processes as needed and stay future-ready.

Speaking on working with Storm, Looby noted; *"The team at Storm were always responsive and helpful. The consultants provided structured onboarding, knowledge transfer, and continuous assistance throughout the project, ensuring we could get the most from Solver."*

Looking to harness Solver CPM to transform your reporting processes? Get in touch with a member of our team today!

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