



National Geographic Streamlines Planning with ISA – Ahead of Schedule and Under Budget

The National Geographic Society, one of the world's largest non-profit scientific and educational membership organizations, is dedicated to the "increase and diffusion of geographic knowledge," and to providing people everywhere with a window on the world. To support its mission it employs over 1,400 employees in ten offices worldwide. It offers a diverse product line, from magazines, books and school publications, to television, film, maps and the National Geographic store and website.

Managing such a variety of products across different industries required a complex, labor-intensive planning process using multiple systems. Too much time was spent moving data, and not enough time was spent analyzing it.

National Geographic wanted to streamline and unify its planning and budgeting process into a single integrated toolset in a user-friendly environment.

Key Benefits

- Reduced from three systems to one web-enabled integrated toolset
- Fewer manual processes
- Ownership of data
- Greater level of operational detail data for analysis
- Better reporting (using PowerPlay)
- Improved workflow and security

THE CHALLENGE

National Geographic was using a combination of PeopleSoft Budget Explorer for departmental expenses, Excel for product profitability planning and Access to enter staffing plans. PeopleSoft General Ledger was used to store allocation rules, and to drive departmental overheads to the product level. Extensive work was required to distribute spreadsheets to planners, collect and consolidate budgets, and enter the data back into the General Ledger for financial reporting and product profitability analysis. The entire budget cycle had to be completed by Thanksgiving to allow enough time for Board approval in December and financial reporting by January.

ISA's challenge was to convert this complex budgeting and allocation process to a web-enabled enterprise-wide planning system, and to do it within a tight timeframe.

THE SOLUTION

An ISA Planning project manager and a senior Enterprise Planning consultant tackled the project. Their goal was to adapt National Geographic's current business process into the Cognos Enterprise Planning Suite with PowerPlay for analysis and reporting.

The first step was a three-day design session with ISA and the client to define the current process. Two additional days were spent deciding how to implement the process with Cognos Enterprise Planning.

The ISA team contributed not only their expertise with Cognos products, and depth of experience in financial planning; they contributed a vision of what was possible. The outcomes of the design sessions were a project plan and a detailed design document.

"When you hire a consulting company, you are taking a risk. Even after the first design

session, we were all really confident that ISA understood the planning process and they knew what they were doing,” comments Director of Financial Planning & Analysis, Melanie Kluger.

ISA and the client worked closely together on implementing the system. “It was really an integrated three person team. Melanie and Jim Gallo [from National Geographic’s Business Systems Group] were key to the success of the project. The ISA consultant shortened the learning curve and transferred his knowledge as we progressed, and within three months the project was complete,” says Steve Vick, Vice President of Financial Planning.

THE BENEFITS

As a result of the implementation, ISA and National Geographic eliminated a huge number of spreadsheets and hard copy reports. They also reduced the need for multiple toolsets, the process of managing and distributing Excel files to the end user community, and the tedious processes required to consolidate and transfer data from one system to another.

Now planners enter through an NGS web-based portal and open one of three applications: Staffing Plan, Department Plan or Product Plan. All three applications are integrated as staffing costs are linked into the department plans and department costs are allocated to the product income statements. This data is ported back into the PeopleSoft G/L through a database link, and to PowerPlay for further analysis. Data flow is seamless, the overall process is monitored by the Planning and Budgeting office, and allocations are performed within Cognos Planning.

Another benefit of the new system is the ability to give access to more users. Previously, only twelve managers were able to enter staffing plans using the Micorsoft Access staffing application due to security limitations. The staffing application built in Cognos Planning was able to be rolled out to each of the sixty department managers. Other users have also been added including the Corporate Finance accountants, who are now involved and can query, monitor and comment on budgets in real time as they are developed.

And because the National Geographic and ISA team collaborated so effectively, the project was completed ahead of time, and under budget. “It’s been a great success. We’ve accomplished much more than we needed to this year and the users are very appreciative of the new system,” notes Mr. Vick.

ABOUT ISA CONSULTING

ISA Consulting is a technology consulting firm focused on helping large companies across all industries turn their corporate data into valuable information for competitive advantage. ISA was founded in 1995 with a vision of providing only the highest quality consultants to carry out this mission. Visit our web site at www.isaconsulting.com.

**For more technical details about this customer success story,
visit www.isaconsulting.com**

“We had a very short time period to get this project done. ISA reduced the learning curve. They translated classroom lessons into our actual application, and we met our deadline.”

*– Steve Vick
Vice President of
Financial Planning.*

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*– Melanie Kluger,
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Planning & Analysis.*



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