

CASE STUDY

with Navigator Group

▷ SME investments



THE COMPANY



- Navigator Group is a German industrial holding acquiring non-core business units of larger companies as well as private industrial businesses.
- Their portfolio including companies from Discrete Manufacturing (e.g. SAPAL, a swiss package machine manufacturer) and Consumer Products industry (e.g. Cesare Fiorucci, an Italian ham manufacturer)

THE PROBLEM

- All investor reports look different by portfolio company and have different level of details
- No ongoing visibility beyond quarterly reporting cycles and just on PDF, making more sophisticated analyses across years cumbersome
- Investor reporting narrowed to financial updates and some few further KPIs

SOLUTION

- Definition of reporting template based on Value-Works best practices for relevant industries
- Prioritization of dashboards & KPIs in waves with portfolio company based on data availability
- Stepwise rollout across portfolio companies
- Enhancement from investor to management reporting replacing existing Powerpoint reports



RESULTS



95%	Data accuracy
100%	business decisions based on data
99% REDUCED TIME	needed to take decisions
70% COST SAVINGS	compared to BI projects

KEY BENEFITS



Minimized ongoing effort

for investor reporting by a high level of automation



Easy and broad access

across standardized reporting by portfolio company now available



Issues can be easier identified

Investors can even be warned in case of current & future problems



"I appreciate very much that we can now clarify topics in real-time within a Board meeting looking at the numbers provided by the portfolio company and available on my tablet."

Dr. Jochen Brinkmann

Managing Partner at Navigator Group