

CASE STUDY

# Controlling that keeps pace with the growth of an investment holding

How an investment group unified controlling, reporting, and planning in Qlik

**Centralized**  
view of finance

**1 solution** for planning  
& reporting





- 📍 Slovak Republic
- ⚙️ Financial Services
- 👥 500+ employees

#### Use cases

- ✔️ Financial Controlling at Holding Level
- ✔️ Financial Data Analysis for Management Decision-Making

#### Technologies used

Inphinity Forms  
Qlik Sense

## Problem

Pro Partners Holding had long used Excel as its main tool for financial data, reporting, and planning. But as the number of subsidiaries grew and the group structure became more complex, this approach no longer met the needs of the holding's management.

Excel could not provide a unified view of data, efficient work with different levels of detail, or sufficient support for planning and management decision-making. The finance department was burdened with manual work, while reporting was time-consuming and difficult to scale.

## Solution

Centralizovali jsme finanční controlling, reporting i plánování napříč holdingem do jednoho analytického prostředí. Management tak získal jednotný pohled na data, rychlý přístup k detailům a výrazně lepší podporu pro rozhodování.

### Before

- ⚠️ Limited unified view of financial data across the holding
- ⚠️ Excel as the main tool for controlling and planning
- ⚠️ Time-consuming preparation of management reports
- ⚠️ Complex work with details and analytical views

### After

- ✔️ Fast transition from aggregated data to detailed analysis
- ✔️ Centralized financial controlling at holding level
- ✔️ Unified planning across companies within the group
- ✔️ Clear management reports available online



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## Solution

- Planning and data work introduced directly in the analytics tool using Inphinity Forms
- Unification of planning processes, improved clarity, and better management decision-making
- Deployment of Qlik Sense as the foundation for financial controlling and management reporting
- Support for management reporting, including profit and loss statements and balance sheet views
- Creation of key performance indicator dashboards tailored to different industries within the holding

The added value of Qlik lies in the ability to look at finance from a global perspective and, within a few clicks, drill down to the full detail of an accounting case. This opens up incredible possibilities for future planning and management decision-making.

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# How much time do you lose between reporting and planning?

We'll show you how to connect controlling, reporting and planning into one unified process.



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