

## CASE STUDY

# Unified planning for the holding without losing flexibility

How a Slovak investment group unified planning across entities in Qlik Sense and enabled direct data input in the app.

**100 %**  
of plans editable

**1 app**  
for the entire holding

**EMARK**



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

#### Use cases

- ✅ Financial data analysis for management decision-making
- ✅ Financial data analysis for management decision-making

#### Technologies Used

Inphinity Forms  
Qlik Sense

## Problem

Pro Partners Holding had long relied on Excel for planning, as many organizations do. But as the number of subsidiaries grew and organizational structures became more complex, this approach could no longer keep up.

The group needed to simplify and streamline planning, and above all unify it across entities, while still preserving the flexibility to work according to their different needs – from detailed to high-level planning.

## Solution

We extended the existing Qlik environment with a planning application using Inphinity Forms, unifying planning across the holding's entities and enabling plans to be edited directly in the app. Pro Partners Holding gained a faster, clearer, and auditable planning process without losing the flexibility of individual companies.

### Předtím

- ⚠️ The tool could not keep pace with the growth and complexity of the holding structure
- ⚠️ Planning differed from entity to entity, without a unified structure
- ⚠️ Excel was the main planning tool across the group
- ⚠️ Limited transparency of changes made to plans

### Potom

- ✅ Ability to select relevant data and periods for planning
- ✅ Planning data edits directly in the app through write-back functionality
- ✅ Unified planning structure for all holding entities
- ✅ Automatic and transparent change tracking



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## Soution

- Improved data clarity by enabling users to select relevant data and planning periods
- Unified planning structure across entities while reflecting their specific requirements
- Write-back approach: editing data directly in Qlik instead of working with external files and versioning
- Extension of the existing Qlik setup in the finance department with Inphinity Forms for planning scenarios
- Governance support through automatic change tracking for transparency, traceability, and easy corrections

Qlik and Inphinity helped simplify and unify the planning process, bringing a consistent structure to it. We also see added value in the ability to select the data and periods to plan from. It is essentially a matter of just a few clicks. As a result, the entire planning process is faster, simpler, clearer, and the work of project managers more efficient.

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# Are you still planning in Excel and hitting its limits as your company grows?

Let's explore how unified and flexible planning could work in your organization as well.



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