

We provide valuable business intelligence, so you can turn raw data into insights and actions.

Business is now more complex than ever. We understand that many businesses use a lot of time and energy capturing and compiling financial data but struggle to make sense of it all.

Today, businesses use various systems to collect and store their data. Then, they need to leverage the data collected and convert it into tangible insights and growth opportunities. This step is vital if business owners want to be agile in our ever-changing business environment.

Putting the right analytical tools and techniques in place, can really improve your business outcomes.

Tools such as financial reporting and analytical dashboards are an invaluable asset for decision makers, especially when making calls that affect the business's direction.

Getting your reporting system right

Our business insights team are part of our Business Advisory division, and specialise in providing budgets and forecasts, performance reporting, and analytical dashboard services.

We build intuitive, customised dashboards using Business Intelligence (BI) tools, that accurately consolidate all your data and highlight previously unavailable insights into your business. You can view what's happening in real-time and run financial reporting analytics quickly, whenever you need.

We offer a combination of financial reporting and operational reporting, and also build interactive reports. Our team also utilise Microsoft Excel® to aggregate your key business information, into easy to understand performance snapshots.

'Clients tell us that having better reporting systems – that combine data, highlight opportunities and share insights – leads to better decision-making and better outcomes.'

How a better reporting system benefits your business

- Systematising and streamlining your business helps you track and analyse your operations, assess your team, identify trends, investigate irregularities, and unlock opportunities.
- Accurate reporting equips you to manage cashflow better. Shortfalls in working capital are easily highlighted so you can see if additional funding is required.
- Reporting helps you improve profits year-on-year. Having the ability to measure your successes and failures using an unbiased methodology, enables you to make decisions that influence profits.
- Thinking of selling? Reporting can improve your resale value and puts the business in the best possible position when you decide to 'step-out'.

Why choose Ulton for your financial reporting?

Our business insights team is highly experienced and passionate about helping you achieve your personal and business goals.

When you partner with us, you have on-demand access to your own dedicated advisor. We are with you all the way, offering valuable insights and guidance to help you make the best possible decisions for your business.

Making things simpler for you is our priority. We deliver easy to understand, intelligent dashboards that consolidate all your data and empower your management team to make accelerated business decisions. We also develop well-illustrated reports and forecasts that the banks and financiers prefer.

Client Story

Alfred E Chave (AEC) is one of Australia's oldest and largest fruit and vegetable wholesaling companies. It's a very well regarded, family-owned business based in Brisbane that sells hundreds of product lines.

Client issues

AEC needed to hit a daily average profit margin to break-even and yet they had four key frustrations:

1. The current reports were often difficult to read and inaccurate.
2. They were not aware of the minimum gross margin they needed for their pricing decisions.
3. They needed to make the sales team accountable for their targets.
4. They needed to enable data mobility.

Our solutions

AEC needed access to real-time data so they could efficiently manage their profit margins and enhance performance.

With access to the backend of their software system, we collated all the data sources, analysed the data, and wrote Power BI® reports, providing the client with real insights from the raw information.

We developed reports that the management and sales teams could use to review and track profit margins, daily. This enabled the business to understand their lost or gained profits and adjust their pricing accordingly.

We also provided education and training to key systems-users to ensure that important data was being extracted from the reporting systems. AEC immediately gained more meaningful data and powerful insights to help them make better business decisions.

Service extension

The next step for AEC is to maximise the opportunities available by pushing the information out to mobile devices. This will give the field staff access to the information to better manage their profit margins anywhere, anytime.

Brisbane
Bundaberg
Fraser Coast
Gladstone

Business Advisors
Chartered Accountants
Wealth Managers

(07) 4154 0400
info@ulton.net
ulton.net



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