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Uncomplicated, with an efficient licensing model for SMEs: Ferax migrates to Qlik Sense Enterprise

"The migration from Qlik Sense Desktop to the Enterprise version was really a breeze. And with Informatec's great advice, we now have a licensing model that is also economically efficient for us as a small company."

Renzo Peduzzi, Partner, Ferax Treuhand AG

Challenges

Migration from Qlik Sense Desktop to Qlik Sense Enterprise On-Premise (Client-managed)

Solution

Switch to Qlik Sense; use of a licensing model tailored to SMEs

Advantages

- Attractive licensing model for SMEs
- Continued use of Qlik Sense desktop apps in Qlik Sense Enterprise
- extended range of functions (duplication of applications, dynamic views, streams, etc.)
- Significantly reduced effort for the provision of reports
- Data update every hour instead of every week

Solution at a glance

Client
Ferax Treuhand AG

Industry
Finance

Region
Zurich

Departments
Management, Consulting

Partner
Informatec

System landscape
Vertec

ROI & Time-to-value

Low time commitment
Only a few hours for setting up the server and migrating the applications

Company-wide
Flexible data analytics available

The client

Ferax Treuhand AG primarily serves small and medium-sized companies from a wide range of industries in the areas of accounting, legal and tax advice, auditing and management consultancy. For private individuals, the range of services extends from tax advice and legal advice to questions regarding pension provision and estate planning. Ferax also supports its clients with start-ups and financing.

Initial situation

Ferax has been using the desktop version of the Qlik Sense business intelligence solution for internal reporting for several years. "At the time, I downloaded Qlik Sense Desktop and tried out mapping and analysing the customer structure or fees based on data from our ERP and CRM industry solution Vertec", reports Renzo Peduzzi, partner at Ferax. "That worked very well. And when I've gotten stuck, I've actually found answers to all my questions in the Qlik community." "The multidimensional view of our data was the decisive trigger for me to use Qlik Sense Desktop", reports Renzo Peduzzi. "Being able to take different perspectives when looking at data is a big advantage when running a business with numbers."

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"If, for example, I need statistics on account managers today and on clients or projects tomorrow, I can just generate these reports with a few clicks and it's ensured that the same data is used - just viewed from a different angle", elaborates Renzo Peduzzi.

However, Qlik Sense Desktop can only be run locally on Windows computers. "I had to update our applications each time as well as upload them to the internal network, and then our colleagues could download the reports from there."

Solution

In order to eliminate the associated manual effort and to make the diverse analysis options of Qlik Sense technology accessible to a broad group of users throughout the company, Swiss IT service provider and Qlik Elite Solution Provider Informatec recommended Renzo Peduzzi migrate from Qlik Sense Desktop to Qlik Sense Enterprise.

Qlik Sense Desktop and Qlik Sense Enterprise share the same architecture. Users can seamlessly upgrade their Qlik Sense solution as their business needs evolve. Apps created in Qlik Sense Desktop can be exported and used in Qlik Sense Enterprise.

"We just had to set up the server and then I copied the apps and uploaded them into Qlik Sense Enterprise, which was really straightforward", says Renzo Peduzzi.

Informatec convinced with their consulting expertise, especially with regard to the special licensing requirements of small companies, reports Renzo Peduzzi: "As a small company with only a two-application Qlik Sense environment, we had to make sure the licensing model fit cost-wise. Informatec advised us very well here, guaranteeing the economically efficient use of the solution."

Areas of application and benefits

On the one hand, Ferax benefits from the migration because it requires less effort to make the reports available to different users. "I can now easily create and publish reports instead of having to save and upload them to the network every time I update", says Renzo Peduzzi.

The timing of data updates could also be streamlined considerably by simplifying provision - instead of once a week, up-to-date data is now available every hour. Qlik Sense is available to all 30 employees. The solution is actively used by around 5 employees for internal reporting.

Future

12 colleagues also use Qlik Sense for auditing tasks. For example, certain lists have to be reconciled regularly, which used to be done manually or via Excel with a relatively large amount of effort. With Qlik Sense, the reconciliation is automated and any discrepancies are displayed immediately.

"This kind of audit took one day per client each year", adds Renzo Peduzzi. "Today it can be done in 15 minutes. Extrapolated to our 15 or so clients, that saves us 2 weeks of work every year. The quality is also higher because data transfer errors are virtually eliminated and we are able to check larger amounts of data."

In future, the use of Qlik Sense as a tool for auditing will be increased.

Customer insights will also be made available in the future.

> "After using Qlik Sense Desktop extensively, we were sure that Qlik Sense's data analytics platform was a good fit for us as an SME before we took it a step further and migrated to the enterprise version."
>
> Renzo Peduzzi, Partner, Ferax Treuhand AG

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