



“With Performancesoft Views in place, now we are able to communicate ‘what is important to the organization’ across hierarchies and geographies seamlessly...cause-and-effect maps have become the basis for all reviews and prioritization of strategic initiatives.”

— Gopal Sharma, Senior Manager – Business Excellence

Voltas Limited, Dubai

The Challenge

To deliver on its mission to provide high quality, cost-effective project management and engineering services to customers throughout Asia, Voltas International’s Electrical and Mechanical Division (EMD) adopted the Balanced Scorecard (BSC) as a tool for strategy deployment in 2004. The BSC was designed for EMD in line with the strategic objectives and cascaded further to all units and business heads for effective implementation. The measures were tracked on a quarterly basis using Excel spreadsheets.

Tracking BSC measures through spreadsheets proved to be ineffective in tracking progress on divisional performance measures. Moreover, due to lack of integration, the performance management tracking through BSC was limited to financial measures only. The non-financial measures were not tracked due to lack of aggregation of data across levels and geographies. This led to

misalignment among various functions, resulting in ineffective strategy deployment across the division.

The major hurdle was ensuring the integrity of the performance data on non-financial measures, hence an integrated system was required to ensure the flow and aggregation of data across all levels. Also the reporting structure on various key performance indicators (KPIs) was not streamlined for effective performance management in the division.

The situation prompted Voltas to seek automation of the balanced scorecard with integrated tracking and monitoring of the KPIs related to strategic objectives of the company.

> INDUSTRY

Engineering Services

> COMPANY SIZE

\$400 million, 3800 Employees

> CHALLENGE

- Spreadsheets ineffective in tracking divisional performance
- Non-financial measures were omitted due to data integrity issues, lack of aggregation
- Strategy unevenly deployed, leading to misalignment

> SOLUTION

- Actuate Performancesoft Suite
- Integration, consulting services
- Customized smart client

> BENEFITS

- Transparency in tracking KPIs, all in one place
- Alignment of action plans to division strategy
- Dynamic performance management, timely reviews



Solution

A team was formed to explore more robust performance management tools. Voltas conducted its due diligence in finding an appropriate solution, and in December 2007 chose Actuate Performancesoft Views as its Balanced Scorecard solution.

The software was customized in-house to the division's needs and implemented across levels and locations. The major challenges overcome during implementation were:

- o **Complexity of location structure and measures structure:** This sophistication and flexibility was a requirement to ensure the integrity and correct aggregation of the data, and needed to be incorporated into the overall system.
- o **Aggregation of financial performance data from different countries in different currencies:** Led by the local support team and Actuate partner EU Partners, a currency conversion facility was created to overcome this hurdle.
- o **Software access through smart client route at project sites:** Weak Internet connection problem was resolved by Actuate Customer Support, installing the executable file of the client on the local PC. An Excel import and export tool is used for data updates to the system.

All the above challenges were addressed easily to match the company's needs, thanks to the versatility and customizable features in Performancesoft Views.

The initial rollout of the performance management system started in March 2008, with successful system deployment across all locations by the end of August 2008. The implementation involved user training on the software and BSC measures.

Benefits

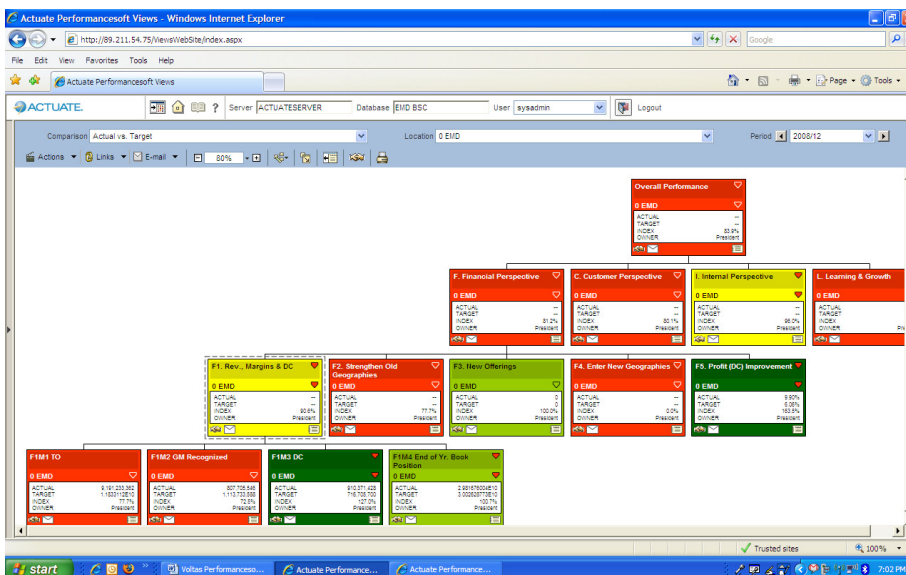
All business reviews are now being conducted online in the system, both at the regional and corporate level. Managers can view the status of each project by just logging into the system, as well as review and approve actions planned by the project lead without waiting for any formal performance review meetings.

This has led to a dramatic shift in the way Voltas manages its performance, and has improved the transparency in tracking KPIs.

Major benefits derived from the implementation are as follows:

"As a business user, in just few days I was able to configure the complete performance management system as per our BSC structure without any IT support"

Dilip Sharma, Project Manager
– Business Excellence for Voltas Limited



Actuate Performancesoft Views at EMD, Voltas Limited showing the cascaded measures



Design Stage:

- o Measurement system evolution and refinement during system configuration
- o Clear, consensus KPI definitions and descriptions
- o Minimal support required during configuration and implementation
- o User training and access with individual user ID and password, cementing ownership and accountability of the scorecard across hierarchies in the division
- o Views' ease of customization to business needs enabled instantaneous execution of required changes in the system.

Rollout and Implementation:

- o Strategy Map and other Cause & Effect maps highly illustrative in communicating the relevance of various measures and their integration with strategic objectives.
- o Action Plans fully aligned to divisional strategy and can be monitored online.
- o Timely business reviews and dynamic communication of performance.
- o All key performance indicators tracked and available in one place; business performance reports generated as and when required.

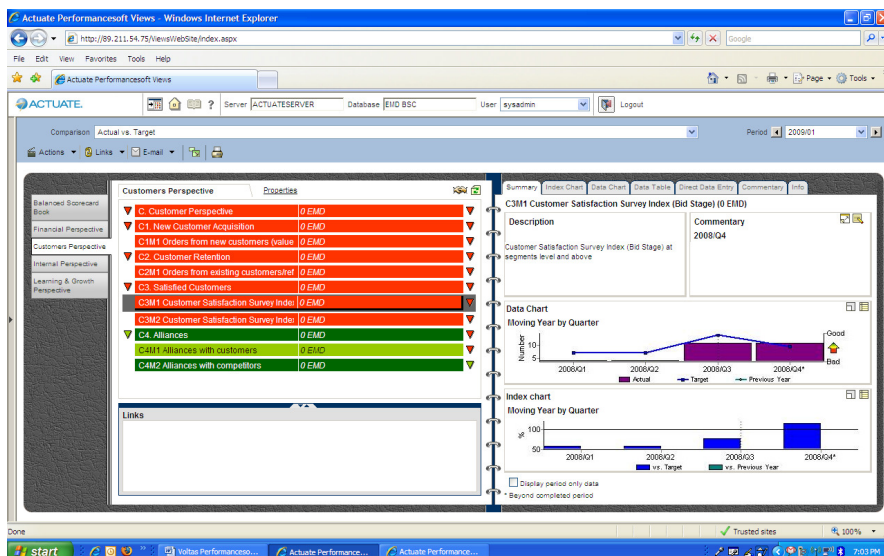
Going forward, Voltas plans to roll out Performancesoft Views access to its subsidiaries and joint ventures for tracking the Balanced Scorecard of allied companies on the same platform and use it as a comprehensive performance management tool for international operations of the company.

About Voltas

Voltas Electrical, Mechanical and HVAC Solutions (International) - EMD

Electrical, Mechanical & HVAC Solutions (International) - is part of Voltas' Electro-Mechanical Projects & Services cluster. Established in 1978 as Voltas International Limited (a wholly-owned subsidiary of Voltas Limited) to handle international business interests, the business looks after core business activities in the Mechanical, Electrical & Public Works (MEP) project areas, specifically turnkey projects in:

- o Electro-mechanical works comprising electrical building services, HVAC (heating, ventilation & air conditioning), plumbing, public health, fire fighting, ELV & specialised systems.
- o Electrical power projects



Voltas has branch offices in Abu Dhabi, Dubai, Qatar, Singapore and Kingdom of Saudi Arabia. www.voltas.com

Voltas Limited, a TATA enterprise, offers engineering solutions for a wide spectrum of industries in areas such as heating, ventilation and air conditioning, refrigeration, electro-mechanical projects, textile machinery, machine tools, mining and construction equipment, materials handling, water management, building management systems, indoor air quality and chemicals. EMD is one of four independent business-specific clusters within Voltas Ltd., each with its own facilities for market coverage and service to customers.

About Actuate

Actuate Corporation is dedicated to increasing the richness, interactivity, and effectiveness of enterprise data, for everyone, everywhere. Actuate delivers the next generation RIA-ready information platform for both customer and employee-facing applications. The Actuate platform boasts unmatched scalability, high-performance, reliability and security. Its proven RIA capabilities and highly collaborative development architecture are backed by the world's largest open source information application developer community, grounded in BIRT, the Eclipse Foundation's only top-level Business Intelligence and reporting project.

Global 9000 organizations use Actuate to roll out RIA-enabled customer loyalty and Performance Management applications that improve customer satisfaction and employee productivity. The company has over 4,200 customers globally in a diverse range of business areas including financial services and the public sector, many of which have a long history of deploying Actuate-based solutions for dozens, or even hundreds of their mission-critical applications. Founded in 1993, Actuate has headquarters in San Mateo, California, with offices worldwide. Actuate is listed on NASDAQ under the symbol ACTU. For more information on Actuate, visit the company's web site at www.actuate.com.

