



CLIENT: INGENIA COMMUNITIES GROUP

Challenge

Ingenia Communities Group (Ingenia) is a leading Australian property organisation owning, operating and developing a rising portfolio of lifestyle communities across key urban and coastal markets.

While Ingenia is a rapidly growing and diversifying company, it was heavily reliant on Excel to facilitate their increasing reporting, planning and budgeting needs. Ingenia's dependence on Excel created challenges requiring substantial amounts of manual processing to solve, such as producing timely and insightful reports to stakeholders.

Ingenia also lacked a central data repository meaning data was siloed across different states and branches, leaving Ingenia without a consolidated data source of truth.

Ingenia recognised this burden would worsen, as the increasing levels of manual effort to find and report accurate data would ultimately result in higher costs and delayed timelines.

To successfully support their growing business demands, Ingenia identified the need to invest in technology and required an experienced partner to trust in recommending the correct approach and technology solution. Ingenia also had a focused internal IT team and required long-term partners capable of advanced technical support.

Approach

Taysols was chosen by Ingenia to assist in developing, implementing, and supporting a solution for Ingenia's business challenges, as Taysols had built a trusted relationship with Ingenia during their initial data journey.

Taysols conducted several workshops with key business stakeholders across Sales, Finance and Operations to gain a deeper understanding of Ingenia's current business reporting processes and technology landscape.

Taysols then worked closely with Ingenia to develop a reporting roadmap and propose suitable technology options to facilitate Ingenia's growing business needs and support diversification.

COMPANY DETAILS:

Ingenia is a leading Australian property group that owns, operates and develops a growing portfolio of affordable seniors' communities and affordable holiday parks. The Group's portfolio is dominated by communities in key metropolitan and coastal markets.

Ingenia is an S&P/ASX 200 entity with a market capitalisation of approximately \$1.4 billion and is listed on the Australian Securities Exchange under the stock market trading code 'INA'. In addition to the Group's on balance sheet portfolio of 64 communities, Ingenia's portfolio includes: two greenfield lifestyle community developments owned through a development Joint Venture with Sun Communities Inc (NYSE SUI), and nine established communities (plus one development asset) through the Group's managed funds. In addition to ownerships interests in the JV and funds, Ingenia receives fees as manager and developer of these entities. The Group is supported by over 3,500 investors and has over 700 employees dedicated to creating community for our residents and guests.

EMPLOYEES:

700+

INDUSTRY:

Real Estate & Tourism

PROJECT TIMELINE:

6 months

TECHNOLOGIES:

Business Intelligence (BI)
System Integration & Data Warehousing

SERVICES:

Consulting
Support

“Ingenia knew we had huge potential in our data, but we were struggling to make the most of it. Engaging the Taysols team has enabled us to now gain insights into our business that are supporting key decisions. The Azure platform including data integration and Power BI and with its ability to support Snowflake, has allowed us to be agile in our delivery of these outcomes and deliver quick wins along the way”

Megan Sweeney
Group Planning & Analysis Manager





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Approach (cont.)

Taysols presented key insights and outlined the roadmap to successfully implement an enterprise-wide Data Warehouse, Business Intelligence (BI) and Enterprise Performance Management (EPM) solution. The roadmap also outlined various technology options available for Ingenia to consider and how these technologies could be implemented and supported with Taysols.

Ingenia engaged Taysols to bring the roadmap into reality.

Ingenia's solution is currently* being delivered in two phases. The first phase of delivery involved Taysols implementing an organisation-wide data warehouse to capture, combine, and consolidate all critical data within Ingenia. This data warehouse allowed Ingenia to manage key data assets and report real-time insights on cross-functional business areas. The second phase required the implementation of an Enterprise Performance Management (EPM) suite to deliver accurate Finance reporting, and budgeting and forecasting capabilities.

* As of July, 1st, 2020

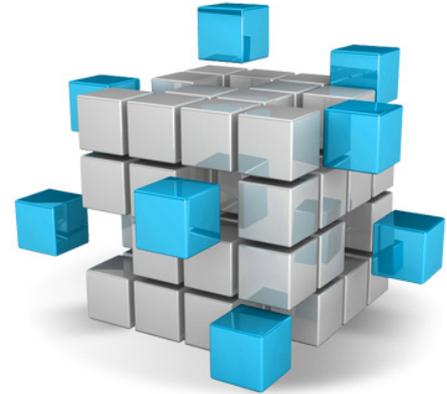
Solution

Ingenia considered multiple Cloud and On-premise options, however, Taysols recommended Ingenia implement a modern Cloud solution to appropriately facilitate their growing business needs and consolidate their geographically spread data into a single source of truth.

Ingenia's Cloud data solution consisted of; Snowflake on Azure as a data warehouse, Microsoft Power BI as their EPM, business intelligence, reporting and insights platform, and Microsoft Azure Data Factory to manage the ongoing consolidation and Extract-Transform-Load (ETL) of their data. Ingenia also chose to implement several other Azure services, such as Azure Storage, to further optimise and ensure long-term data capability.

Taysols worked closely with Ingenia's IT team to successfully implement Snowflake and Microsoft Azure, integrating data from existing source systems including JD Edwards, Dynamics, and NewBook. Taysols then worked in close collaboration with the relevant Ingenia subject matter experts (SMEs) to design and develop the data solution, maximising Power BI's capabilities to quickly deliver the key business insights and reports required by stakeholders and unlocking Ingenia's growth potential.

Power BI Apps were also created for the Sales, Finance and Operations teams providing Ingenia deeper insight into both their Customer Journey and Tourism business. These Power BI Apps included advanced mapping functionality providing Ingenia with the ability to drill into the data and better understand their communities and where their customers were on their Ingenia Customer Journey. This functionality enabled Ingenia to ensure customer satisfaction and retention across all their properties.



KEY BENEFITS:

Ingenia are now able to make business decisions based on the most up to date data as a result of having a central data platform containing key data from a number of source systems. The executive team have especially benefited from having access to this insight as needed through Power BI for smartphones and devices.

The ability to make accelerated business decisions based on this data provided Ingenia with the key to unlock lost time and facilitate their accelerating growth. The ability to have immediate access to data from several sources – including data that was not in their data warehouse – allowed Ingenia to monitor rapid market changes and manage their business accordingly.

Ingenia's forward thinking to ensure ongoing data capability proved crucial during the COVID-19 pandemic. Taysols was able to set up and automate additional daily data feeds within hours, enabling Ingenia to rapidly and accurately measure the impact of the COVID-19 pandemic on their business with the detail required to quickly respond to any potential situation.