

# How PivotXL Streamlined Young Brothers' Budgeting Process and Empowered Decision-Making

## Who is PivotXL?

PivotXL is an innovative software solution designed for businesses seeking to optimize their financial management processes. Our team of experts — skilled in market analysis, data-driven insights, and technological advancements — is dedicated to transforming how businesses use spreadsheets. Built upon the familiar Excel platform, our software streamlines budgeting, forecasting, and reporting, empowering businesses to make confident, informed decisions.

Embrace the future of financial management with PivotXL – a comprehensive solution that combines the best of spreadsheet functionality with advanced automation and data analysis tools to drive your business success.

## The Challenge

Navigating through the complexities of their budgeting process, Young Brothers grappled with manual operations and outdated methods that hindered efficiency. The company resorted to sending Excel files individually to business stakeholders via email, resulting in frequent follow-ups and ineffective communication.

The process of consolidating numbers from various stakeholders was time-consuming and prone to errors, making it difficult for Young Brothers to maintain accurate and up-to-date financial data. Moreover, gathering insights from multiple stakeholders proved daunting, further complicating the overall budgeting process.



## About Young Brothers

Young Brothers is the leading interisland freight handling and transportation company in Hawai'i, serving individuals and businesses by moving goods via barge among the Hawaiian Islands.

With a dedicated team of approximately 350+ employees, they offer fast, frequent, and reliable service to ports across the islands, ensuring seamless and secure transportation for every shipment.

In integrating PivotXL, Young Brothers had three different goals in mind:



Utilize their existing Excel files without having to recreate their entire system.



Prepare for their budgeting process upfront and execute it seamlessly, avoiding last-minute stress and sleepless nights coordinating efforts.



Decrease the budget cycle time by 50%, increasing efficiency and productivity.

Recognizing the need for a more efficient and reliable solution, Young Brothers approached our team at PivotXL to help them streamline their budgeting process, reduce errors, improve stakeholder collaboration, and achieve financial management goals.

## Our Solutions

To address Young Brothers' unique challenges and goals, our team at PivotXL took a tailored approach — implementing a range of solutions to streamline their budgeting process, enhance collaboration, and improve overall efficiency.



### Seamless Data Integration

We enabled Young Brothers to build Excel files connected to the Cube, allowing seamless integration that ensured financial data remained accurate, up-to-date, and easily accessible.



### Automated Updates and Document Management

All updates on tasks were automatically captured by PivotXL, while supporting documents were uploaded directly within the tasks themselves.



### Task Calendar Creation

By building tasks upfront and connecting them to the Excel files, we helped Young Brothers create a task calendar, effectively organizing their budgeting process and providing a clear overview of upcoming responsibilities.



### Consolidation of Insights

With PivotXL's team environment, insights related to the future could be captured within tasks and easily consolidated by the finance team — facilitating better decision-making and allowing Young Brothers to focus on driving business growth.



### Efficient Task Distribution

When it was time for budgeting to start, Young Brothers could easily send all tasks to the stakeholders with a single click. The task engine followed up with them regularly, ensuring accountability and timely completion of tasks.

PivotXL transformed Young Brothers' budgeting process into a more efficient, collaborative, and data-driven operation. This strategic partnership enabled their leadership to focus on driving business growth and making informed decisions, setting the stage for impressive results and long-term success in their financial management.

## Results



Templates now effortlessly link with a centralized data repository, streamlining the Finance team's workflow by eliminating the need for manual spreadsheet consolidation.



In-depth, fully auditable reports equip management to promptly identify and rectify bottlenecks, optimizing overall efficiency.



An extensive audit trail reinforces user accountability and allows the Finance team to instantly revert to previous spreadsheet versions, facilitating seamless comparisons of differences over time and supporting well-informed decision-making.

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We had purchased another on-premise system five years back that was not being actively used. PivotXL allowed us to use our existing Excel templates and slowly transition into a cloud system.



Travis Lockhart — Manager of Finance and Business Analytics, Young Brothers Limited

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I have been using PivotXL for 3 years now. It's user auditability, validation reports and streamlined workflow has significantly increased our budgeting process and accuracy of output numbers.



Melina Fleming — Finance Manager, Young Brothers Limited

**Get In Touch**  
[pivotxl.com](https://pivotxl.com)

