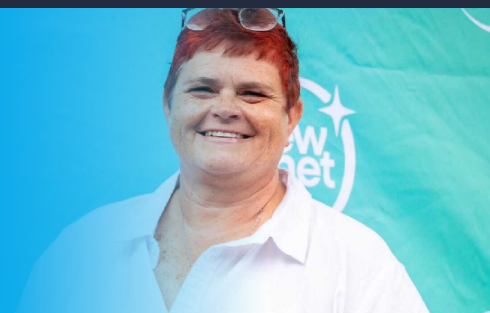


CASE STUDY

TWO-DAY MANAGEMENT PACKS, NOW A FEW MINUTES



New Planet has grown from three people to a **300-strong, 11-entity group** across fibre and solar. Its finance team now builds group management packs in minutes, with Joiin consolidating every Xero file, Claude sitting on top as the interface.

11

entities consolidated across fibre and solar, with two more coming on stream

300+

employees, grown from a founding team of three

2 days

of monthly management packs, now a few minutes

CHALLENGE

With 11 Xero files under one roof, every group-level report meant opening each entity, downloading the income statement and rebuilding it in Excel. Management packs were a two-day job, and with the CEO, COO and senior stakeholders all needing answers, every question meant more Excel and less strategy.

SOLUTION

Joiin consolidates all 11 Xero files into a group debtors report, creditors report, income statement and balance sheet in one click. With the Joiin MCP connection wired into Claude in Excel, the team asks in plain English and trusted, consolidated data lands in the template ready to go.



“What used to take me days to do management packs, **literally it's a few minute exercise.**”

Head of Finance · New Planet, Johannesburg

BENEFITS

01

Month-end in minutes

Two-day management packs now take a few minutes, every month, across all 11 entities.

02

Leadership sees ahead, not behind

A weekly CEO/COO dashboard rebuilds itself with RAG indicators, trend lines and predictive shortfall alerts.

03

Real money found

Loss-making fibre contracts identified, renegotiated or exited; fleet and per-person costs analysed on demand.

About Joiin: Group financial reporting and consolidation software for accountants and finance teams. Joiin pulls data straight from Xero, QuickBooks, Sage and more to build consolidated, multi-currency management packs in minutes, with Joiin Intelligence adding AI commentary and Q&A on top.

IN PRACTICE

Weekly reporting to the CEO and COO

The finance team's flagship report is a weekly executive dashboard, and it drives the group's leadership decisions. Every week the team opens the Excel template, asks Claude to refresh it through Joiin, and the whole thing rebuilds itself.

Trends & RAG indicators

Group sales & EBITDA vs budget

Quarterly cash flow vs debtors

Recurring annuity revenue

Value made vs value consumed

Per-entity budget variance

The report doesn't just present numbers. It projects where the group is heading, flagging how far each entity is tracking above or below budget. Finance walks into the leadership meeting with next quarter's picture already surfaced, and with cash and debtors pulled alongside the income statement it can show the CEO and COO exactly where the money physically sits versus paper profit.

"It says, if you carry on like this you're going to miss your budget by x%, **and which entity sets off a red warning.**"

FINDING THE MONEY

Loss-making contracts, exposed

For the fibre businesses, the team asked Claude to pull the true cost of installs, maintenance and remediation through Joiin: fuel, technicians, stock, systems, the lot. Some contracts were quietly losing money. New Planet went back to the customers underpaying for the work, renegotiated where it could, and walked away from the rest.

"You're paying us X, but with fuel, technicians, stock and systems, it's costing us more. **We've either renegotiated, or said we're just not interested in that type of work.**"

A human always signs off

Joiin delivers the accurate consolidated dataset; Claude is the interface. Every pack still passes under the Head of Finance's eye before leadership, investors or banks see it.

Real people on hand

Alongside the automation, the team values human support: someone to jump on a question, help set up a new report, or talk an idea through.

THE OUTCOME

- Management packs cut from days to minutes, every month.
- Cash flow visibility across all 11 entities.
- Fleet costs analysed to the cent, weekly.
- 90-95% Claude accuracy, verified against Xero.
- Weekly executive reporting rebuilt from scratch in minutes.
- Loss-making fibre contracts renegotiated or exited.
- Per-person cost analysis on demand for the first time.
- Real-time answers to leadership questions in plain English.

"Between Joiin, Xero and Claude, **it really is a game changer.** Without this it literally is a pain in my backside. This is my day to day."

Head of Finance · New Planet