Delivering a Unified + Decentralized Planning Process with Workday Adaptive Planning

36 Weeks of Effort | 30+ Modeling Sheets Delivered

Sales Models

- Topline Total Planned Sales for each location
- Selection of Seasonal vs. Business Days driver
- Line of business specific Sales Mix model breaks out total planned sales at each location by SKU
- Mix %'s seeded from historical data

Cost of Sales (COS)

- COS calculated by respective SKU and location planned in Sales Mix model
- Automatic COS calculations backing into COS values using Gross Margin and Sales % metrics
- Gross Margins and Sales % metrics seeded from historical data

Operating Expense

- Trended OPEX in each location based on historical data

Personnel

- Active Roster and Open Requisitions Planning by position

Top to Bottom Decentralized P&L Planning

Developing both a unified and decentralized planning process always proves to be challenging. We were tasked with deploying a planning approach that at its core was the same for 4 distinct business units, but contained different sets of calculations, SKUs, and rules. The solution enabled the client to take a bottoms up approach at each location within each line of business (LOB) without sacrificing the intricacies that make each specific LOB unique.

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Here's a peek at how Invisors leveraged the full capabilities of **Workday Financial Management** + **Workday Adaptive Planning** for our client:

Decentralized Planning
with Workday Adaptive Planning

- By decentralizing the process to location and line of business, individuals that know the ground floor best do the planning.

Personnel
with Workday Adaptive Planning

- While the broader P&L planning occurs by location, line of business, and other dimensions, the planning team was enabled to plan Active Roster and Open Requisition related expenses down to the position level.

Planning Impacted by Historical Data
with Workday Adaptive Planning

- The planning process for the client combined manual data entry and driver selection, with considerations based on Actuals data.
- Breakback %'s and metrics specific to each SKU + location are seeded based on their respective slice of the larger pie in the desired trailing period from Actuals data.

From Detail to Consolidated
with Workday Adaptive Planning + Workday Financial Management

- The client's decentralized process eventually consolidates up into one comprehensive plan, with Planning Admins able to approve bottom levels leveraging Adaptive Planning's Workflow feature.
- The total plan is then published into Workday for consistent data across one system.

YOU HAVE TO TRUST YOUR PARTNER TO LEAD YOU THROUGH THE PROCESS + DELIVER ON YOUR VISION.

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