

Deloitte.



Deloitte and Adaptive Insights: Plan better together

Transforming finance
to drive more value

Despite considerable investments in technology solutions, many finance organizations still face the same planning, budgeting and forecasting challenges they've always faced: too much data to sift through, too little time to produce meaningful reports, and too few insights to create accurate forecasts.

Part of the problem is that many traditional organizations are saddled with manual spreadsheets and processes and legacy on-premises solutions. This situation keeps them stuck in static-planning mode without a clear path forward. Cloud-based corporate performance management solutions, like Adaptive Insights, offer a chance to forge ahead. With this new breed of business planning cloud solutions, finance leaders can shift to an active planning model, and in so doing, finally resolve their age-old planning, budgeting and forecasting dilemmas. The trick is figuring out how to get from here to there.

Moving from static planning with spreadsheets and manual processes to active planning with continuous financial modeling, reporting and analysis is a journey. That's why implementing the technology isn't enough. Though tools are critical, they don't accomplish much without a roadmap for unlocking their value. That's where Deloitte excels. We offer strategies and solutions, not just tools.

Why Deloitte

Deloitte understands finance and analytics. And Deloitte knows Adaptive Insights and Workday. Going well beyond slinging code and implementing the system, Deloitte provides end-to-end services for companies seeking true, cloud-enabled business transformation. More specifically, Deloitte offers one-stop access to the skills and experience needed to transform your

financial planning, reporting and analysis processes and enable them with Adaptive Insights. Our qualifications include:

- A leading global Workday practice, with experience across Workday Financials, Workday HCM and Adaptive Insights, a Workday company. Our global Adaptive Insights team has implemented over 30 global projects across multiple industries.
- Leading human capital as well as finance and enterprise performance practices with extensive experience in delivering workforce planning and financial and operational planning solutions across all industries.
- Deep technical skills for integrating Adaptive Insights with other on-premise and cloud-based ERP systems as well as for extending the platform with advanced digital technologies, such as advanced analytics, visualization, machine learning, and robotics process automation.
- A multi-disciplinary approach that combines industry-specific knowledge with functional capabilities across strategy and operations, risk, financial advisory, tax, and cyber security.
- Proprietary, industry-specific tools, including a universal banking accelerator for deploying Adaptive Insights (see side bar).
- The capacity to transform the entire planning process, including performance analysis (current and past), scenario modeling, performance monitoring, and management and external reporting.



How would your finance organization answer the following questions?

- Do you spend too much time gathering, compiling and manually manipulating data?
- Does it take too long to unearth insights or to answer key business questions?
- Do you lack confidence in the timeliness and accuracy of your forecasts?
- Do you doubt the ability of your budgeting, planning, and forecasting processes to drive business results?
- Is your business planning platform flexible enough to model and forecast anything?
- Do you struggle to meet reporting deadlines?
- Is your close process inefficient and time-consuming?
- Are you already on your digital journey but you're not sure what comes next?

If you answered, "yes" to many of these questions, then Deloitte, together with Adaptive Insights, can assist you in your efforts to overcome these challenges and drive more value.



Through implementation plus transformation, you can:



Gain business agility



Deliver meaningful reports in minutes



Produce accurate budgets faster, more easily and with greater confidence



Visualize performance through self-service, interactive dashboards



Discover better ways to invest and control costs



Model scenarios quickly across a range of variables



Forecast revenue and expenses more accurately



Predict the results of new opportunities and business models



Collaborate across the entire enterprise from anywhere



Achieve greater accountability and transparency

Extending the value proposition

Enabled by artificial intelligence (AI) and machine learning, our predictive planning solutions, which are customized to meet the distinct needs of your organization, can provide an effective way to get more return on investment (ROI) from your planning, budgeting, and forecasting efforts. And, your business leaders don't have to take our word for it; through proof-of-concepts, we can help you demonstrate the results.

Though no model is perfect, we've seen companies substantially improve annual and quarterly forecast accuracy—with less variance and greater speed than traditional methods—while building their predictive capabilities in the process.



About our universal banking accelerator

Universal banks face unique planning, budgeting and forecasting challenges. Due to the complexity of their business models, universal banks have largely been underserved by off-the-shelf planning software. To address this gap, Deloitte, in collaboration with Adaptive Insights, has developed a universal banking accelerator. This tool takes into account capital requirements and interest-rate variability and provides pre-configured formulas for calculating loans and payments. With it, users can run scenarios and analyze the profitability of their products simply by inputting a few variables. Overall, the accelerator allows Adaptive Insights to be implemented and adjusted more quickly to meet a bank's specific needs, enabling users to plan, report and analyze their businesses with greater agility and data integrity.



About our workforce planning accelerator

The accelerator utilizes Deloitte's best practice Enterprise Planning process flows and expertise in Workday HCM to accelerate design and implementation of Workforce Headcount and Compensation planning application in Adaptive Insights and Workday.

Features include:

- Assumptions – working hours, superannuation, income tax rate, performance review month, percentage increase and benefits
- Employee/position based planning – compensation and non-compensation expenses, Headcount, Status change (transfer, termination, leave of absence), default salary by salary grades, salary by job/position title
- Linkage to projects in providing supply (FTE) to fulfil resources demands created by projects
- Demographics information – skills, highest education, Gender, etc.
- Pre-built dimensions, accounts and sheets
- Pre-built expenses, headcount and demographics dashboards and report
- Integration with Workday HCM (data and metadata)

Contact us

The path to better planning is different for everyone. Adaptive Insights can be implemented quickly, which is a big plus; but, it's a much longer journey to optimize its value. To explore how Deloitte can help you develop a roadmap for transitioning from static planning methods that barely keep pace to active planning processes that continuously support well-informed decision-making, please contact:

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