

The Planning Lab

As finance leaders make structural changes to their finance departments— weaving together a mix of shared service centers, centers of excellence and outsourcing arrangements—they create new opportunities for the remaining or “retained” finance function to add more value. Case in point: The financial planning and analysis (FP&A) function, which may be particularly poised to play a more strategic role across the enterprise.

To leverage the FP&A function’s power, finance leaders need to focus on increasing its capacity, capabilities, and ability to collaborate that will result in FP&A delivering a wide range of data-driven insights to support everything from operational decision-making to organisational strategy. That’s where Deloitte’s Planning Lab can help.

Unleashing the Potential and Power— of FP&A



Deloitte’s Planning Lab is a one-day experience designed to help finance leaders set and align on FP&A strategic priorities, identify tangible initiatives, and mobilise their organisations to launch these undertakings.



We begin the day by exploring and articulating your vision for the FP&A organisation, as well as examining stakeholder and customer expectations.



First, we create a list of attributes that describe how FP&A leadership envisions its ideal future state. Next, we discuss market-based innovations in FP&A practices, technology, organisation, and baseline strengths and opportunities associated with your organisation’s current practices. Finally, we align and prioritise on tactical next steps to achieve the vision for FP&A.



The day concludes by developing a portfolio of specific initiatives for action, milestones for each initiative, and potential barriers to avoid.



More than a meeting

What makes Deloitte's Planning Lab different? Tested, repeatable results. Each Lab incorporates five core attributes, honed from years of experience working directly with CFOs and other finance leaders on FP&A related issues.



Research-based content

The Planning Lab relies on empirical data, original research, and conversations with subject matter specialists both within and outside of Deloitte to guide the experiences.



Immersive methods and exercises

Expect exercises that draw from behavioral research, team dynamics, and conversations with your own people to maximise Lab participation. We developed, sharpened, and tested inter-linked exercises to guide participants through the Lab journey. These intelligent designs enable us to harness the full power of each individual. We engage practitioners in a specific way so that each person contributes to help shape every outcome.



Experienced facilitators

It takes experience and discipline to make significant progress on a tough challenge in a single day. That's exactly what our facilitators bring to the process. We specialise in intervention, disruption, alignment, and consensus.



Consciously designed environment

If you want new ideas and fresh thinking, it helps to have a space conducive to innovation. That's why Deloitte built a Lab space with mobile panels, dynamic furniture configurations, and other state-of-the-art resources designed to stimulate productive conversations. We can conduct a lab anywhere, not just within our own dedicated space.



Relevant subject matter specialists

Deloitte has the reach and relationships to tap specialists with hands-on FP&A experience. We use their experience as a springboard to inspire and stimulate your own practitioners.

Mobilise

Has your team long yearned for a seat at the strategy table but now that the opportunity has finally arrived, you're unsure how to move forward? Deloitte can help. Choose the fast, reliable way to get your efforts on track. Participate in our one-day Planning Lab. Let's connect and discuss whether the Planning Lab may be a well-suited match for your specific needs.

Contacts

Martin Jermy

Enterprise Performance Management
Practice Lead
mjermy@deloitte.co.uk
+44 20 7007 3240

Ravi Sonpal

Planning, Budgeting & Forecasting Lead
rsonpal@deloitte.co.uk
+44 20 7303 5311

This publication has been written in general terms and we recommend that you obtain professional advice before acting or refraining from action on any of the contents of this publication. Deloitte LLP accepts no liability for any loss occasioned to any person acting or refraining from action as a result of any material in this publication.

Deloitte LLP is a limited liability partnership registered in England and Wales with registered number OC303675 and its registered office at 1 New Street Square, London EC4A 3HQ, United Kingdom.

Deloitte LLP is the United Kingdom affiliate of Deloitte NSE LLP, a member firm of Deloitte Touche Tohmatsu Limited, a UK private company limited by guarantee ("DTTL"). DTTL and each of its member firms are legally separate and independent entities. DTTL and Deloitte NSE LLP do not provide services to clients. Please see www.deloitte.com/about to learn more about our global network of member firms.

© 2021 Deloitte LLP. All rights reserved.

Designed by CoRe Creative Services. RITM0656464 (2)