

Automated,
accurate and
adaptable budgeting
and forecasting,
on an international
scale

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Over the last 20 years, Experian has established its reputation as a global leader in business information services. With offices in 39 countries and employing over 16,000 people worldwide, the company seems to show no signs of slowing growth. But a business of this size and scale does not come without its challenges. In August 2014, Experian approached Deloitte to help them roll-out a new Workforce Planning solution – this meant designing an improved set of processes around budgeting and forecasting Experian's £1bn staff costs and catering for a complex global network. David Murray, Head of Global Finance Centre of Excellence, says "We chose Deloitte over other organisations because we were looking for a partner that had proven ability to deliver a multinational project and strong abilities to partner with a range of stakeholders across our firm".

The brief from Experian was clear: they wanted to replace their spreadsheet-based models with a system that was automated, adaptable and more accurate. A six-person team from Deloitte took the first steps in creating a process that would provide consistency for Experian's staff cost budgeting and forecasting throughout EMEA, APAC, and LATAM.

Project Manager, Martin Jermy, explains "To start with, we had to assign the most suitable people to the project. We pulled together a team who had implemented similar solutions before so that Experian could benefit from their experience. Skills in Oracle Hyperion Planning – a web-based planning, budgeting and forecasting solution – were an absolute must. It was also key that we were introducing something that would be of long-term benefit to Experian".

The roll-out was first initiated in EMEA, using the existing Workforce Planning template from the UK and US, before moving on to APAC and LATAM. Workshops were held as part of a Gap Analysis phase to help document each regions' current budgeting and forecasting methodologies. Localised models were developed for 18 countries, with a further 17 countries receiving a standardised model. "Once we had all the necessary information, we started to build the new solution according to the business requirements, applying a range of rigorous testing and acceptance phases to check for accuracy", explains Marc Jones, Deloitte Planning Lead for the LATAM region.

After sign-off, a group of 'Super Users' were trained on the new solution and would be responsible for knowledge-sharing with other users. Marc adds, "One of the obstacles that we faced during the project was working across different time-zones, so we established regional hubs in London, Malaysia, Colombia and Brazil which we would work from at critical stages of the project."

After a stringent testing phase, and with training completed for all regions, the only remaining milestone for the project was the go-live. The new Workforce Planning solution was launched to over 100 users with resounding success at the end of January 2015, delivered on-time and within budget. As a result, Experian now has a solution that will largely automate and standardise processes around staff cost planning, and allow users to have better visibility and transparency of labour costs. Oracle Human Resources (HR) is now integrated with the wider corporate planning and forecasting processes. David Murray puts the successful execution of the project down to three main reasons: a good working relationship between both parties, a deep understanding of the project needs and the ability to execute using proven delivery methods with a team driven to deliver results.

Deloitte.

 **Experian**

ORACLE **Diamond
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