

# Delivering a Unified + Decentralized Planning Process with Workday Adaptive Planning

**+30** MODELING SHEETS DELIVERED

**36** WEEKS OF EFFORT

## 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)

- Cost of Sales 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 Expenses

- 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.

Here's a peek at how Invisors leveraged the full capabilities of 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.

