

Hospitality Company Moves FP&A Processes into Single System with Financials + HR

36 Weeks of Effort | 50+ Modeling Sheets Delivered

Income Models

- 6 unique revenue models for 6 lines of business
- Track + Event, League, Foundation, Broadcast, Media, and Other

Expense Models

- Personnel Modelling for Active Roster and Open Positions expense planning
- CAPEX Model with Accumulated Depreciation driven by Asset Class
- 2 OPEX sheets for Media and Non-Media lines of business

Reporting

- Supported the creation of 100+ custom reporting solutions

Balance Sheet Model

- Indirect + Direct Balance Sheet

Providing a unified, single system approach deployed in parallel to Workday Financial Management + HCM

The Invisors team developed a **flexible methodology + deployment strategy** to successfully build and deploy **Workday Adaptive Planning** in parallel to the client's Workday Financial Management + HCM deployment.

With this deployment being a **merger** between two companies there were plenty of **competing requirements** and a true need to go from multiple and duplicative processes to **one merged and efficient planning process**. Due to the implications of Workday design decisions on the Workday Adaptive Planning deployment team's approach, regular **project-wide touchpoints + development sessions** were held to ensure the broader solution was taking a unified, **big-picture approach**.

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



Centralized Planning

with Workday Adaptive Planning

- Enabled the corporate team to consolidate its planning process across one decentralized organization

Reporting

with Workday Adaptive Planning

- Supported the development of specialized reporting sets for various lines of business
- Trained end users + report writers to use, create + distribute reporting solutions for their teams

Personnel

with Workday Adaptive Planning

- Assumption-driven expense planning at the position level, aggregated by department
- Incorporated HR planners with the broader planning team for a more accurate + complete forecast

One System

with Workday Adaptive Planning + Financials

- Adaptive model structure, dimensions + chart of accounts fed directly from Workday FDM on an automated basis
- Unified data model leveraging Publish to Plan + Drillback features to post plan data real-time from Adaptive Planning to Workday + drill into historical data directly from Adaptive Planning