

## Workday Adaptive Planning for Professional and Business Services

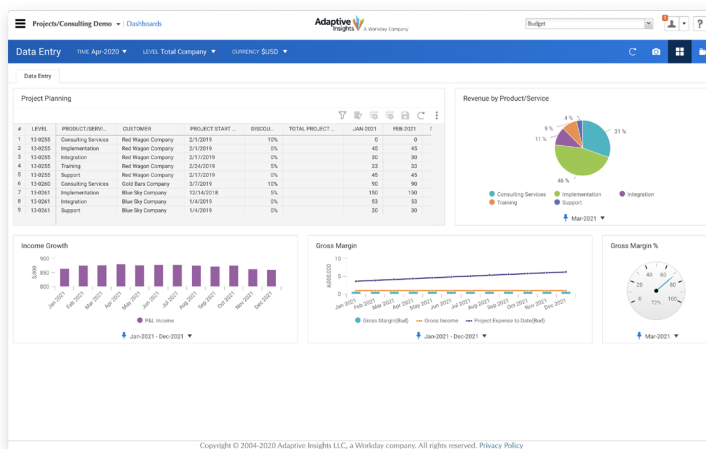
Professional services firms are facing massive changes in how they manage the business. They need to adapt to change as opportunity emerges—add service lines, create new consumption models, digitize services, and acquire businesses. Overall, firms need to build a resilient practice that can support ongoing training, reskilling, and project management, and quickly navigate around disruptions and seize opportunities.

Yet, many professional services firms lack a planning solution that can help them visualize the benefit of new services lines, analyze in-house workforce skills, determine the delivery process for current and upcoming projects, or adjust plans and projects in real time. They can't identify the right workforce mix and talent strategy to meet current and future business needs.

Workday Adaptive Planning brings together financial, project, and people insights to help professional services organizations take action in real time and plan with agility in times of volatility. With Workday, services companies can chart the best course of action by allowing leaders to compare multiple scenarios, immediately see the impact on the financials and the workforce, and seamlessly act on the decisions. It offers powerful modeling, reporting, and analytics for organizations of any size, making it easy for anybody who plans to rapidly adapt to their changing business needs.

### Key Benefits

- Chart the best course of action with insights across people, projects, and financials
- Extend planning beyond finance to gain business agility
- Create a holistic company-wide plan across finance, HR, sales, and delivery
- Empower practice leaders with self-service reporting and analysis to make better decisions faster
- Gain efficiency by automating data integration and removing manual processes



Scenario planning across the project portfolio.

## Compare Scenarios Across Your Projects with Multiple Variables and Dimensions

Model your business across finance and operations with “what-if” scenarios, and change the models as your business evolves to react quickly to market changes and increase project profitability. With Workday Adaptive Planning, you have the freedom to analyze the way you manage your business with unlimited dimensions; for example, you can model your business by customer, project, region, department, employee type, and more for full visibility into profitability, expenses, and margins. You can also run multiple scenarios based on expected project or hiring delays, consultant rate changes, utilization rate, and quote to cash. Model integrated P&L, balance sheet, and cash flow statements, including effects of sales on accounts receivable, deferred revenue, and cash. You can then compare all your options to make the best timely decisions.

## Beyond Head-Count Planning to Workforce Planning

With Workday Adaptive Planning, services organizations can quickly adjust hiring plans in response to economic growth or downturn and improve the use of their billable resources. They can quickly see the fully loaded cost of each employee and easily allocate their workforce across multiple projects, departments, or service offerings. Assign calculations to groups of people or to specific individuals and tie head count to both costs and revenue, and easily perform utilization and gap analyses. Analyze key metrics, such as employee utilization and service line profitability, and use this information to carefully plan head count.

What’s more, with Workday Adaptive Planning, professional services organizations achieve strategic workforce planning. Collaborate with key stakeholders to create effective talent plans and to identify skills gaps and how best to close them. Perform what-if analysis to compare various hiring scenarios and their impact to projects and to the bottom line. And the ability to quickly adjust plans to reskill, hire, or contract gives you insight into the best way to plan for the future.

## Align Revenue Forecasts and Sales Plans with Corporate Objectives

Revenue planning for services organizations is often complex, involving drivers such as bill codes and bill rates, and key comparisons such as paid hours versus billable hours. For longer-term projects, organizations also have to consider complex revenue recognition scenarios for various revenue streams. With Workday Adaptive Planning, professional services organizations can forecast revenue faster and more reliably. Create driver-based revenue and sales forecasts for all business units in collaboration with finance, sales, and service teams, then continuously monitor actual performance against objectives and the resulting impact on cash flow and balance sheets. Quickly and frequently reforecast, and make adjustments based on different revenue assumptions as market conditions change.



For anyone still dependent on Excel spreadsheets for corporate budgeting, Workday Adaptive Planning is the easy and smart transition to a modern cloud-based application.

**CFO**  
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## Self-Service Reporting and Analysis

Professional services companies are highly distributed and matrixed with P&L responsibilities aligned with service lines or regions. Workday Adaptive Planning allows these service line and department leaders to run self-service reports and model their own business scenarios, analyzing and reporting the data based on how they manage their business by customer type, project type, region, department, or any other dimension. The leaders can have their own personal, interactive dashboards to analyze key metrics, including sales per employee, billable and paid man-hours, utilization of billable resources, and so on. Use reports to perform variance analysis, and drill down into underlying transaction detail from other systems.

## Integrate with Core Business Systems

Professional services organizations rely on business applications such as ERP, HCM, CRM, PSA, and others for timely execution. Workday Adaptive Planning integrates with any business system and external data source to enable comprehensive planning, analysis, and reporting. Purpose-built domain intelligence makes it easier and faster for users to build and adapt functional models. Compatibility with Microsoft Office products enables the quick creation of board reporting, and the web-based, highly customizable interface allows users to operate in a familiar Microsoft Excel environment.

When deployed with Workday Financial Management and Workday Human Capital Management, you have an enterprise planning and management system that lets you plan, execute, and analyze across your business.

## Built for the Cloud, Designed for Business Users

Built with patent-pending Elastic Hypercube Technology, Workday Adaptive Planning offers power, scalability, and performance without compromising ease of use. This technology not only calculates complex models, but also adds memory and compute power as necessary to evaluate model elements in parallel. With embedded intelligent planning powered by machine learning, users can model, report, and analyze with speed and flexibility.

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Without Workday Adaptive Planning, we wouldn't be able to run a gigantic project and make decisions in real time.

**Director of Strategy**  
Telus



+1-925-951-9000 +1-877-WORKDAY (+1-877-967-5329) Fax: +1-925-951-9001 [workday.com](http://workday.com)

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