

# FP&A Transformation Talks

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# FOREWORD



**Financial Planning & Analysis [FP&A] professionals are holding the opportunity of a lifetime in their hands. We call it the trillion-dollar opportunity. That is the value creation we can realize if we can unlock the full potential of FP&A.**

Today FP&A teams spend up to 70% of their time simply collecting, cleaning, summarizing, and sharing data. This leaves little time for analysis and even less for influencing business leaders with insights derived from the analysis. This contrasts with the real mission of FP&A that is 'to drive the right strategic choices in the company'.

FP&A is due for a transformation. In fact, it's been long overdue. FP&A knows it. CFOs know it. Even business leaders know it. They know it because the pandemic made it clearer than ever that a strong FP&A team is needed to ensure companies make the right choices.

In this eBook we discuss the steps needed to get this transformation done. We unveil how FP&A is ideally suited to support strategy formulation and execution as well as the overall transformation agenda that most companies are driving. We deep-dive on the new operating model for FP&A and what roles you should have on your FP&A team. We also review an approach to process transformation that will help you deal with the core processes of FP&A.

The eBook also has insightful interviews with FP&A thought leaders that share their first-hand experiences with FP&A transformation. They have seen the beauty and the beast of transformation and share lots of tips on how you can drive the transformation.

**We hope that this eBook will help fuel your FP&A transformation because the time is now. If you don't do it someone else will! Are you ready to step up your transformation efforts?**

**Anders Liu-Lindberg**  
Business Partnering  
Institute





## FP&A TRANSFORMATION TALKS

**The time is ripe to unlock the new potential of Financial, Planning and Analysis. FP&A is at a sweet spot for real transformation, and it's up to finance professionals to take the lead and own the changes to come.**

This is not simply a matter of digitising processes or adopting new technologies, although these are tools of the trade and form a crucial part of the roadmap for change. Real transformation alters our behaviours and our culture and steers us on a new course towards greater success.

The great transformations of history have shaped the finance profession. When steam engines replaced horsepower, visionary industrialists had to collaborate to realise their lofty goals. A new structure, the corporation, was created to manage the financing of the railways and distribute profits to the stakeholders.

Fast forward to the 1970s and the arrival of accessible computing power. The first killer app, the digital spreadsheet, changed the culture of the accounting profession and the behaviour of finance professionals and gave us the tools for rapid and effective planning and analysis. FP&A was born in the fires of transformation, and continually evolves to stay relevant.

### LEADING THE WAY

In the same way that 19th century industrialists transformed business and created new corporate structures to realise their vision, the finance function can lead the journey towards a new vision for financial planning and analysis.

The last two years of disrupted lives have been a training ground for transformation, and FP&A is at the head of the field to benefit. Finance has a great reputation for delivering despite sometimes being hampered by older 'just good enough' systems and low investment priorities. Processes pivoted in response to Covid, a Black Swan event that stretched FP&A to the limits and threw its transformation needs into sharp focus.

*"It's time to seize the day. This is the moment for finance professionals to take the baton of transformation and run with it, leading the race to the next level and unlocking the value potential of FP&A."*



## UNVEILING THE NEW VISION FOR FP&A, BY FP&A

Finance professionals are ideally placed in the business to maximise the success of the FP&A transformation strategy. We hold a unique place in every organisation with a holistic view of operations, a seat at the decision making table, and strong relationships with peers in every function. To achieve a genuine and valid transformation, the vision must be shared both within FP&A and throughout the organisation. Communication, collaboration and trust at the highest levels are essential in taking the whole business along for the transformation ride. After all, the roadmap for transformation benefits everyone, taking FP&A from an inward looking culture to one that faces its customers and delivers on their needs.

Success also depends on a team that is ready to make meaningful and effective changes. Consider the FP&A team of the future. What does it look like? How can it operate in an Agile way to best serve its customers?

*"This team must have the wherewithal and skill to go beyond strategy to action, staying abreast of developments in the profession and adopting the best and latest tools to deliver on the promise of a transformed Finance, Planning and Analysis function."*

Finance has the authority and the responsibility to ensure that the roadmap for FP&A transformation is adopted and the strategy executed, achieving maximum value for the business and its stakeholders. The new vision for FP&A is at our fingertips, an evolution whose time has come.



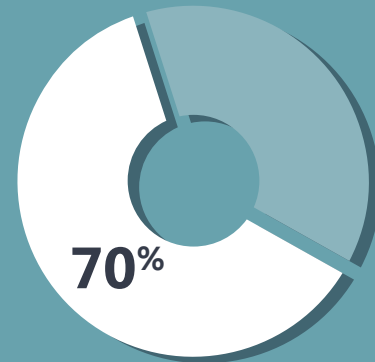


## FP&A & STRATEGY - A MARRIAGE MADE IN HEAVEN

**It's a sad fact that almost 70% of transformation strategies fail to deliver the return that business leaders and stakeholders expect.**

The factors in failure have nothing to do with the size or maturity of the organisation. Some of the most high profile transformation failures over the past decade have impacted huge multinationals like Procter & Gamble, GE and Ford.

"almost **70%** of transformation strategies fail to deliver the return that business leaders and stakeholders expect"



Success or failure in transformation revolves around the goals, the clarity of strategy, and the communication and team buy-in within the organisation. When you're changing the culture of a business, everyone has to be along for the ride. This is why the finance function holds all the cards in the transformation game.

We see the impact of every strategic decision as transactions filter their way into the books. We have a unique birds eye view of all the operations of the company. To do our job well, we must maintain great relationships with our peers in different functions. We sit in the middle of the feedback loop from planning through action to analysis. Transformation and FP&A are a marriage made in heaven.





## UNLOCKING STRATEGIC VALUE

**Tony Saldanha**, who ran the IT and Global Business Services at Procter & Gamble for almost thirty years, compared the root of transformation failures with Alice's encounter with the Cheshire Cat in Alice in Wonderland. When Alice asks which way to go, the Cat replies that the direction depends on where she wants to get to.



Too many transformation strategies focus on the means, not the end. They don't take account of what the activity is intended to create, deliver or solve. FP&A has the tools to define the outcome of a strategy and provide clear direction based on reliable data from all around the company and in the market and wider environment in which it operates.

Finance is in a unique position to draw the company together. FP&A engages with every function in the business. This collaboration and cooperation is essential for transformation success. Take Ford, whose Smart Mobility initiative was segmented from the rest of the organisation. Rather than becoming a beacon of hope it was seen as a threat, draining investment from other areas. A holistic approach unlocks the strategic value potential of transformation, and FP&A is perfectly placed to ensure this happens.

**It's a marriage made in heaven.**





## Driving Strategic Choices

**Data-driven decision making at the highest level of the business leads the way to effective strategy and successful transformation. FP&A can support this evolution in several key ways.**

Use your analytical skills to set clear goals. What do you want to create, deliver or solve? When do you want this to happen?

Take the wealth of data that passes through your hands and make sure you understand the needs of your customers and how their experience can be improved.

Keep an eye on the competition. What is happening in the world around you is as important for planning as the internal data you collect.

Bring all of the senior management team along on the journey. Transforming FP&A in isolation will not deliver success, and will not achieve cultural change. Use your good relationships and lead the way.

Plan carefully and long term. Transformation cannot happen overnight. Be ready for resistance where you least expect it and have the data at your fingertips to mount persuasive arguments for change.



Financial, Planning and Analysis goes hand in hand with strategy for transformation success. What can you do now to kick start a cultural change for FP&A?  
**Take the first steps towards your future.**

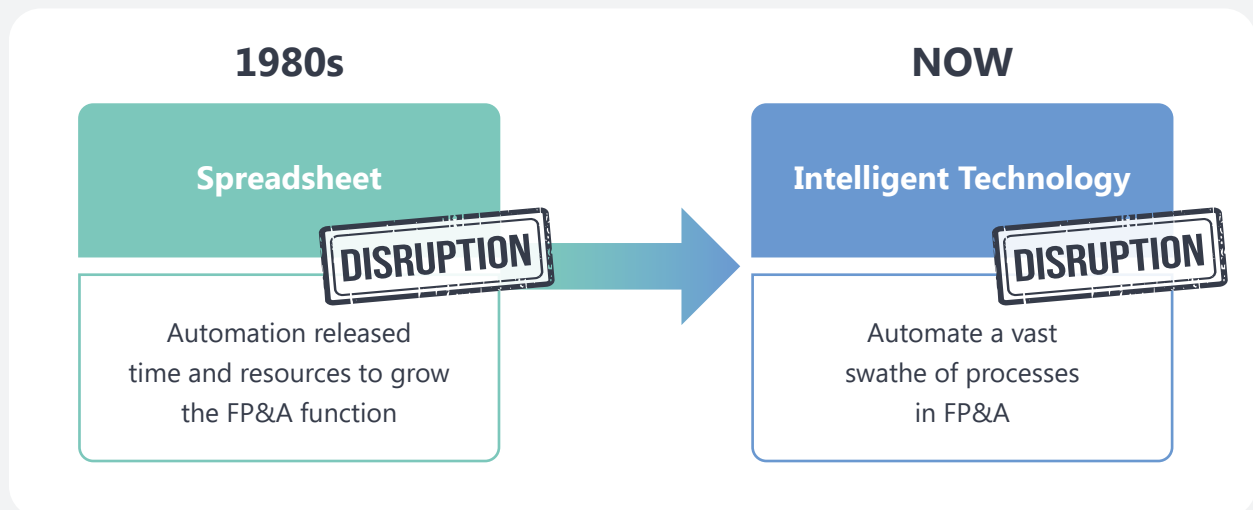




## SETTING THE FP&A TEAM OF THE FUTURE

When the world moves fast, FP&A must organise in an Agile way to stay ahead. The operating model of FP&A needs to evolve to meet the challenges of this digital age, and finance professionals have a role to play as leaders in business transformation.

We have arrived at a watershed moment in the profession.



We must be ready to harness the power that will be unleashed.

### This vision of the future requires:

- 1 A team with the digital and analytical skills to realise the maximum value for the business from transformation.
- 2 We manage automation with confidence, champion data-driven forecasting and performance measurement.
- 3 We use our soft skills to adapt and change with the landscape of technology and evolving business structures.



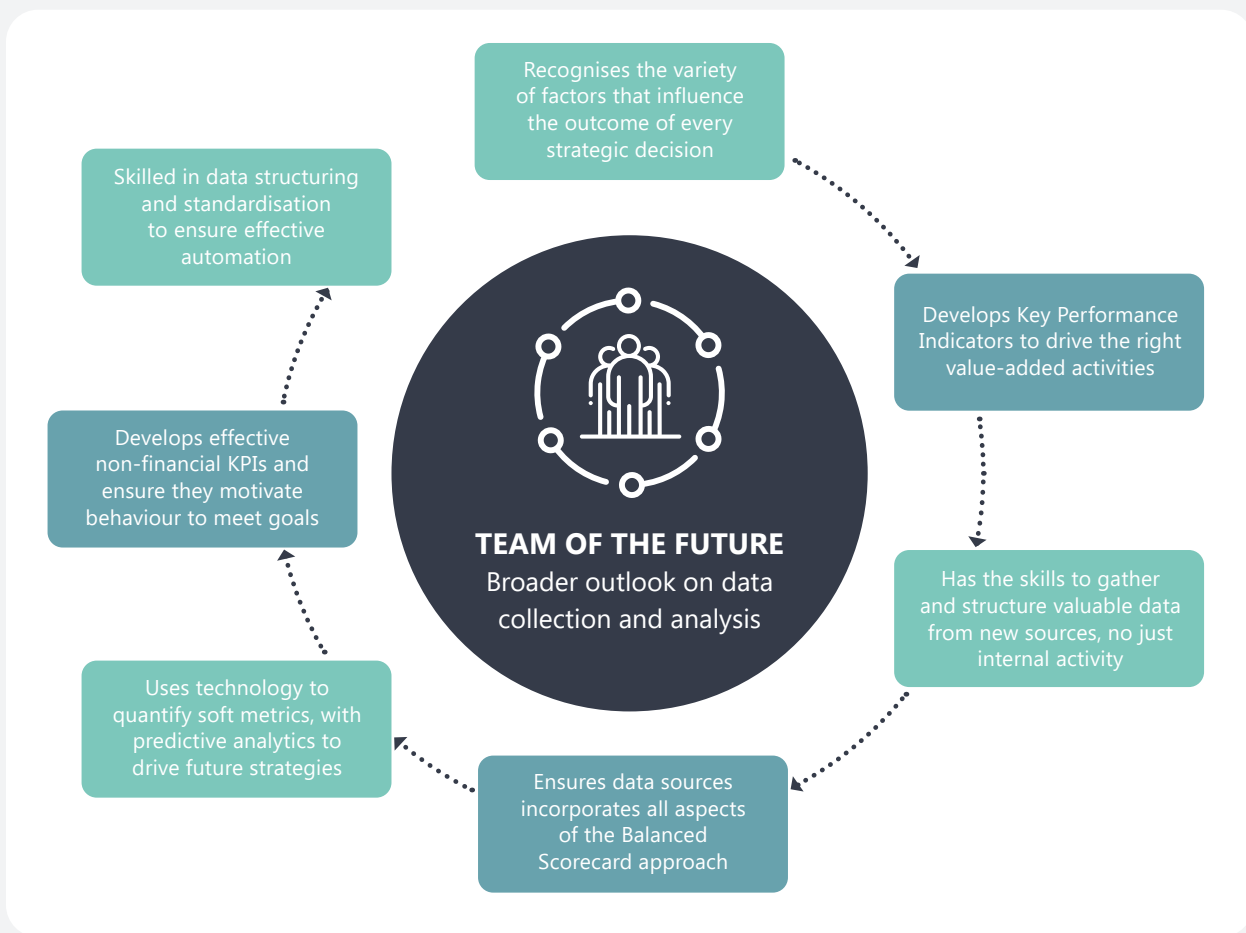
**It's a new world, and one where the most agile finance professionals will thrive.**





## BUILDING THE IDEAL OPERATING MODEL FOR FP&A

The new operating model of finance recognises the subject matter expertise of FP&A and its focus on delivering the best data for business decision making. The traditional roles of transaction processing and reporting remain, of course, but in an automated form that releases resources to explore value drivers in the business and move the focus to planning with an uninterrupted forward-looking view.



The FP&A team of the future must have an end-to-end approach to effective decision support, ensuring that automated analysis is transparent and appropriate. This enables the team to constantly improve their understanding of how the business generates value, slicing the data by product or function to develop detailed segmented insights for making targeted decisions and implementing appropriate, effective KPIs.

Business leaders are looking for the next competitive advantage, and the FP&A team of the future is perfectly placed to deliver.



## EFFICIENCY, INFLUENCE AND INFORMATION

The FP&A team of the future will:

- 1 Operate with greater efficiency
- 2 Have more influence on operations
- 3 Supply better information for decision making.



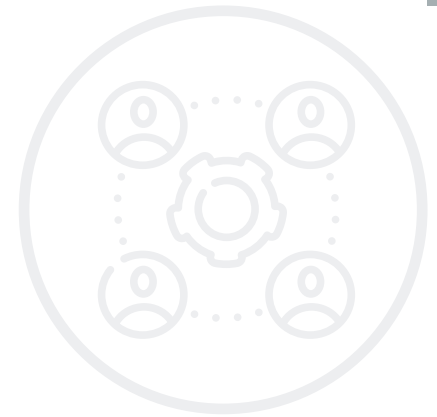
This reflects the new agility required of any successful business.

Whether you think of the coming years as the advance of Industry 4.0 or as the realisation of the Metaverse, we are already in a time of rapid and global change. Businesses have to move fast in response to change, otherwise they will not keep pace with their market and their competitors.



Decisions cannot wait. It is up to FP&A to deliver to its customers timely, precise, data-driven insights to support those decisions. **Build your skills now, and grab the opportunity that awaits.**





## WHAT ROLES DO YOU HAVE ON YOUR FP&A TEAM?

An agile FP&A team must put its people front and centre of strategy. Transformation cannot be successful without bringing the human resources of finance along on the journey.

Team members drive the realisation of the future vision.

### The FP&A team of the future will:

- 1 They are willing and ready to transform themselves along with the culture of the organisation and the operational structure of the finance function.
- 2 They take responsibility for informing the corporate strategy of transformation with timely and reliable big data drawn from relevant sources and analysed using AI and deep learning.

To achieve this, what roles and skills are part of the FP&A team of the future? Professional bodies and global consultants from AICPA and CIMA through Oracle and McKinsey have identified the essential elements for future-facing strategic success. These include the:

- 1 Soft skills of communication, leadership and influence
- 2 Technical skills required for effective use of artificial intelligence and data visualisation
- 3 Ability to maximise insight and impact.

Agile finance leaders will drive investment in the training and development of the finance function to encompass these skills, and look to business partnering to help FP&A to meet its strategic responsibilities.



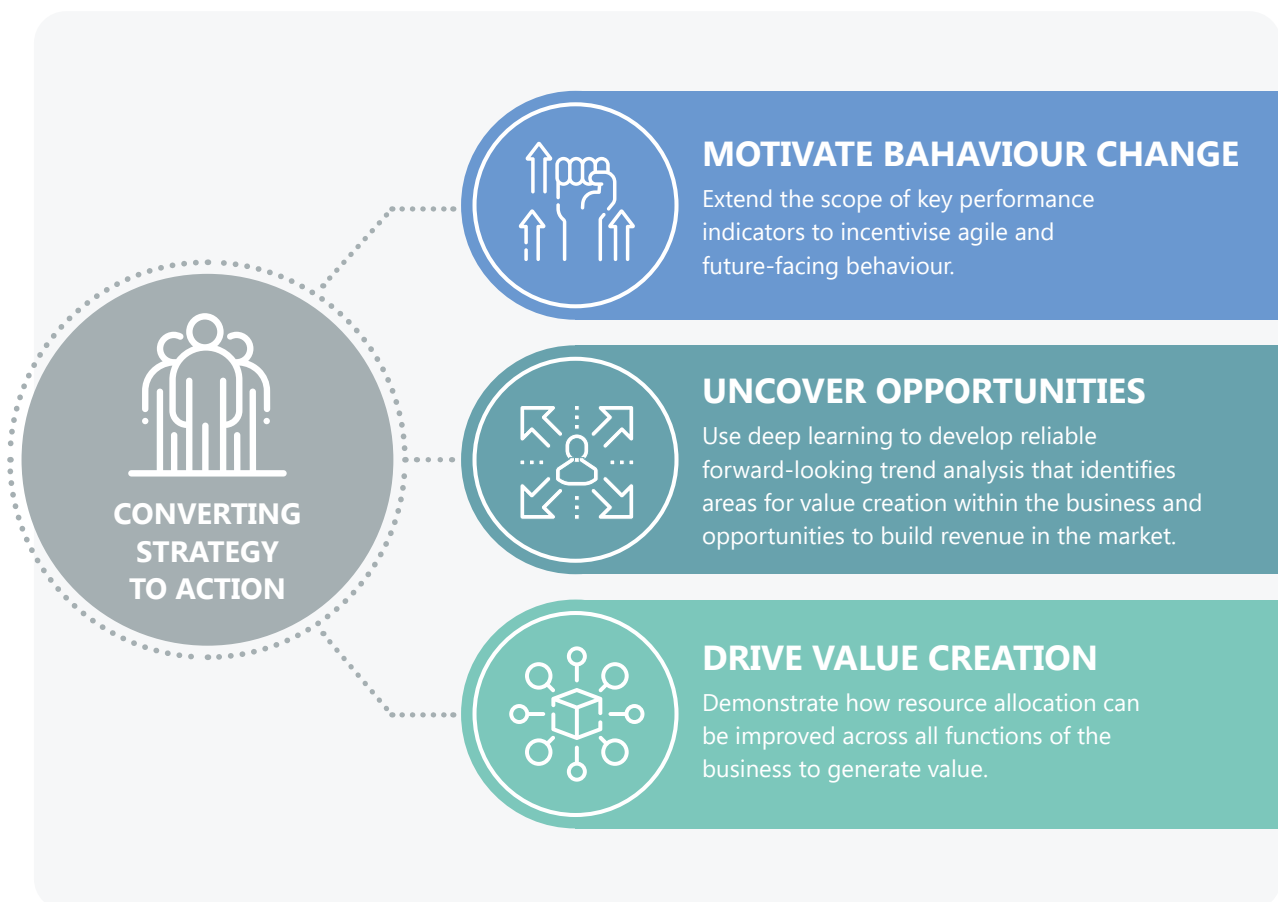


## STRATEGY, THEN ACTION

The vision of the future is an FP&A team that facilitates the innovative strategies and competitive performance of the organisation through data-driven, AI supported insights. This team is responsible for delivering decision critical information to the corporate leadership team, and is accountable for the depth and accuracy of those insights.

The data processed goes far beyond the financial metrics of prior decades. AI enables measurement and interpretation of intangible drivers of value. A broader view of the environment in which the business operates enables FP&A to identify opportunities and threats not simply within the organisation but in external market sectors and geographies. In a global business, the FP&A team holds the key to meeting new challenges in an agile way, for example pivoting to navigate the optimal course as environmental issues are brought to bear in supply chain management.

What do we do to convert strategy to action in our transformed FP&A roles?





## TAKING YOUR PLACE IN THE TEAM

Our rapidly evolving business environment needs agile finance leaders with a broad range of new knowledge and experience. As we move towards the new operating model of finance, it is clear that a successful transformation relies on the agile skills of you and your colleagues.

How can you lay the foundations for success?

- 1 GROWING.** Professional bodies have already stepped up to build the skills of their members; take advantage of the expertise that they offer, which covers a broad swathe of subjects from AI and data analytics to robotic process automation and blockchain.
- 2 PRACTIVE.** Actively explore the new landscape of transformation. Identify the reputable sources of information in the noise of digital communication, and take on board the insights and ideas that they publish.
- 3 CONNECTED.** Develop relationships within the finance function, in the wider business, and with business partners. Your communication skills and mutual respect will pay dividends in bringing everyone together to support both the strategy of transformation and rapid agile responses to change.



Take action now to claim your place in the new FP&A operating model. **The future is bright, and we want you along for the ride.**







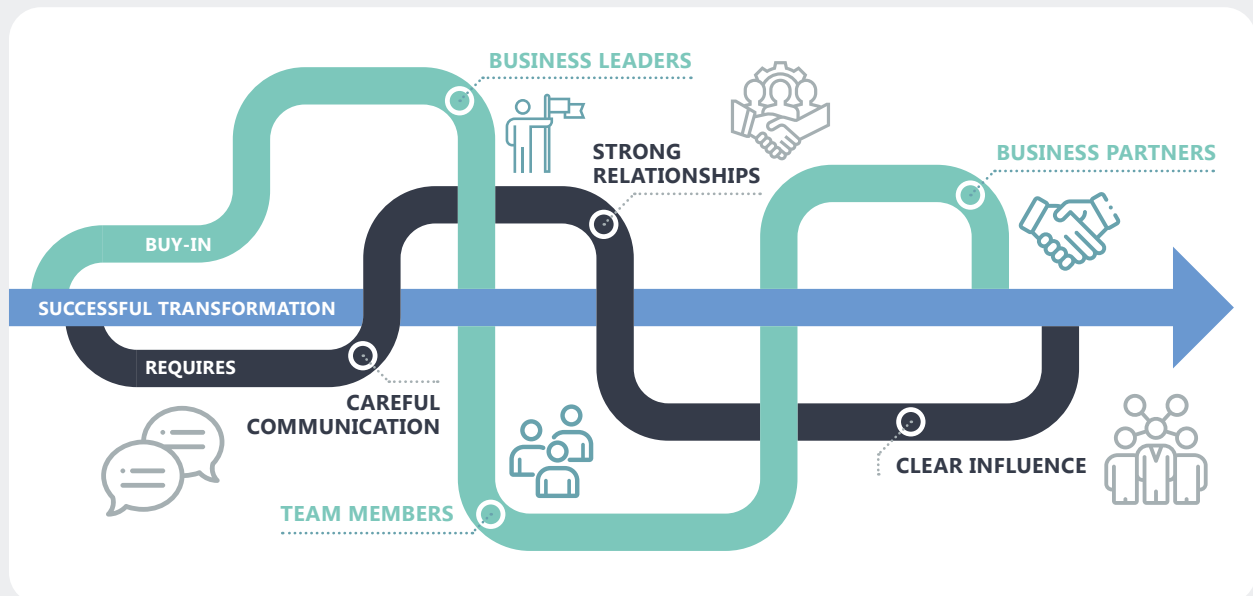
## THE FP&A TRANSFORMATION PROCESS: A DEEP DIVE

The transformation of the finance operating model and all the roles within the function is not an overnight or straightforward process. This is a major change project and has to be managed as such.

At the very outset, we must have a clear vision of what the transformation will create, deliver or solve.

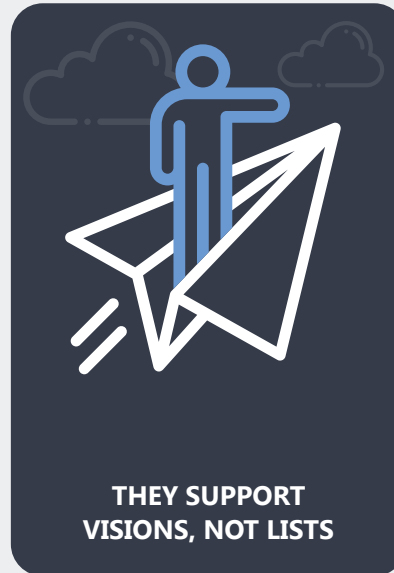
- 1 It will create new roles and responsibilities for FP&A, establishing its place as the provider of forward-facing, robust decision making data.
- 2 It will put new technology at the heart of planning and analysis, adding huge value to the deliverables of FP&A.
- 3 It solves real problems for business.

These new skills and tools shine a light on the future and enable agile decision makers to react with confidence in a fast moving environment, and deep analysis exposes opportunities for value creation and business success.



This is a chance to develop some of the skills of an agile finance leader at the very start of the process. The way you seek to inspire when leading a major change is important.





## EVOLUTION, NOT REVOLUTION

It's important to remember that this sea change is not really a revolution but an evolution. The underlying logic of planning and analysis does not change, but the scope of the data we process is expanding exponentially, the technology we rely on is new to many of us, and some of the tools we will use in the future are still emerging. We still have to satisfy our reporting and regulatory responsibilities, but these are also transforming.

When was the last time you filed a set of paper documents? In the space of fifteen years we have gone from carrying boxes of annual payroll reports to the tax office to automated real-time information that can be analysed and acted upon by the authorities. Technologies such as the XBRL open standards for digital business reporting now enable anyone to analyse filed financial statements and dig deep into the accounting treatments beneath the numbers.

The transformation process, at its very heart, aims to unlock value in the finance function. This supports the iterative nature of evolution. Value is derived at each stage of the transformation roadmap, whether that's in reduced cost or streamlined processes or new revenue streams. Rather than hoarding the value, invest it in the realisation of the next stage, developing the skills of the FP&A team or technologies that will support the goals of the transformation. In realising the vision, skills and structure must be aligned. The value released at each stage can make this happen.



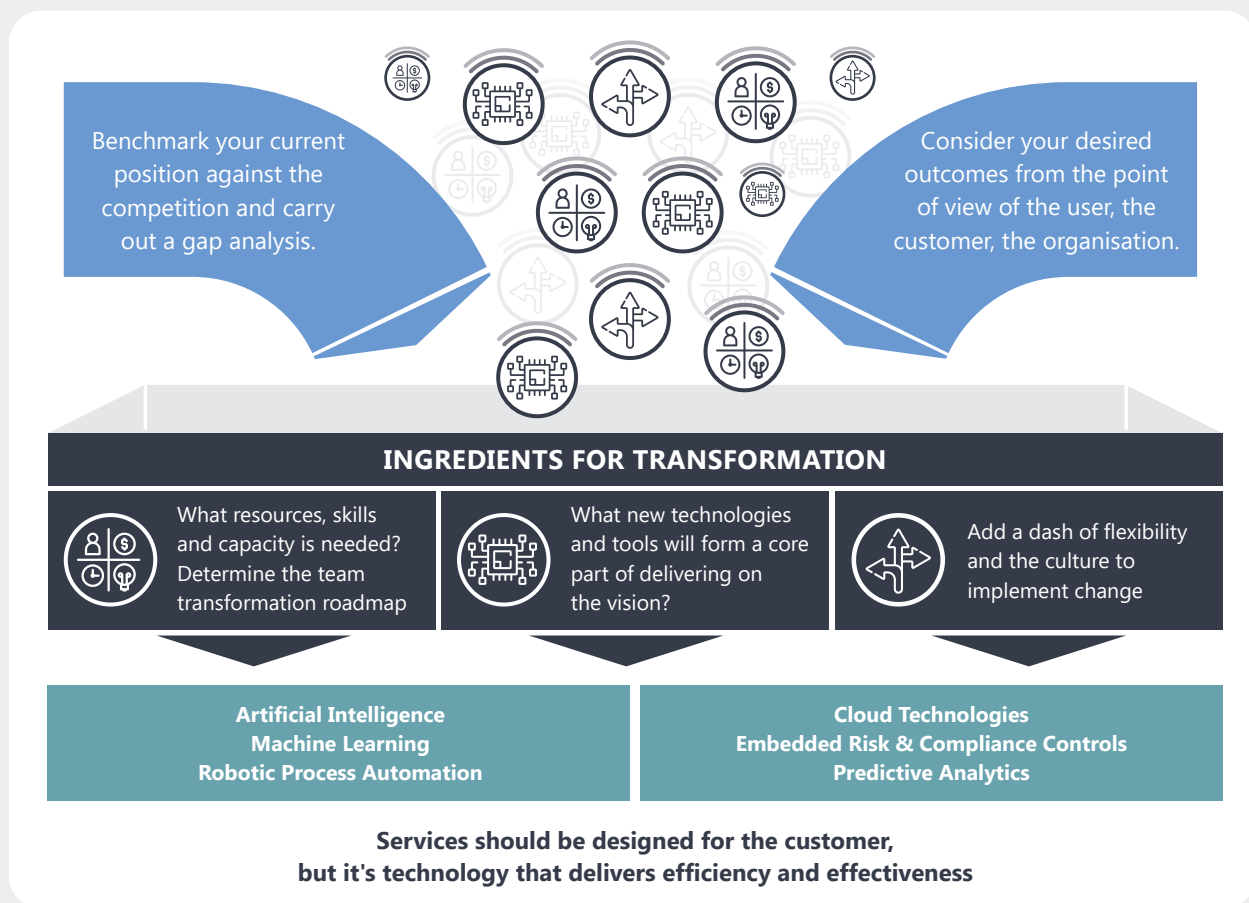


## A RECIPE FOR SUCCESS

The starting point for success is to understand where you are and where you should be, and explore what your customers, the users of your analysis, actually want.

Benchmark your current position against the competition and carry out a gap analysis. Consider your desired outcomes from the point of view of the user, the customer, the organisation. Once you have all of this laid out, then the ingredients for transformation can be defined.

What needs to be in the mix?



**!** The transformation process is not an easy one, but FP&A is ready for the challenge and eager to take hold of the opportunities it will bring. **Get ready for the journey of a lifetime.**





## INTERVIEW: THE VITAL FP&A TRANSFORMATION MINDSET

Paul Barnhurst - Director of Finance, Sales Operations and Analytics

### KEY TAKEAWAYS:

- Transformation helps give finance the insights needed to take its seat at the table.
- Use the tools you have at hand to deliver the data that's needed.
- Transformation is not just a tool or a process but primarily a mindset of delivering value.



Paul has been through the transformation process several times in his career. He shares some fantastic insights into his experience of FP&A transformation, the vision surrounding a successful roadmap, and the people, the processes, and the technologies that have to change as part of that transformation journey.

[READ THE FULL INTERVIEW WITH PAUL](#)



*"I've seen at least three transformations take place," Paul tells us, "more if you count smaller groups." Let's look at some of the keys to success that emerged from one of his most successful transformations.*

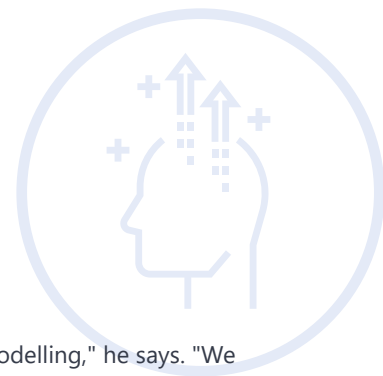
### A COMPLEX CHALLENGE

"We had a planning system but overall we lacked tools, didn't have robust driver-based models," says Paul. "When I started, the finance department had high employee turnover and it was hard to have any kind of continuity and real processes, when they had also done 50+ acquisitions over the last decade that were loosely integrated. We had the seat at the table, but we weren't providing enough value. The transformation was figuring out how to provide the value without the investment to fix all the systems that needed fixing."

We had a CFO who identified a problem and had a real vision for its solution.

• *"He sat us down and explained, 'We're not providing the support, the business can't get the answers they need from us, I realise we have a lot of data issues, I realise we have turnover. But the first thing we have to do is to improve these models we built.'" says Paul.*





The response opened the floodgates to transformation. "We built very robust driver-based modelling," he says. "We really started to understand the business." The CFO placed Paul in charge of a particularly complex company in the group.

*"I wasn't a fabulous modeller," he admits, "but I wasn't bad. I knew my way around Excel. The transformation forced us to start learning and digging into the business. We started to really understand the different products and our margins - we didn't even know what our margins were on some of our products and we didn't understand a lot of our costs."*

Paul's tale of the old budgetary control cycle will send shivers down the backs of every accountant who has ever experienced something similar. "People had just been doing run rate averages," he explains. "For example, last year was \$6 million, we want to grow 10%; last year this month was \$450k, so this year it'll be \$490k. And then we missed by \$300k. And everybody's like, what happened? Oh, there's this thing called seasonality in this business, and four and five week months, and all kinds of things that had not been properly accounted for in the budget. So it was no wonder we ended up missing materially by the end of the year.

## DRIVERS OF TRANSFORMATION SUCCESS

Paul and his team started to build models from the ground up. They learned how much a salesperson would really sell, met regularly with the product team, got to grips with the roadmaps, and defined what new revenue looked like. They modelled sales commission structures and made changes to incentivise profitable behaviour. They pulled together multiple sources of data, spending days figuring out how to answer crucial questions about product focus, product margins, and customer behaviour.

The depth of overall knowledge gained from the modelling process helped bring finance into the decision making process for pricing.

*"I'd walk through the margins and the math," says Paul, "but it's really a commercial decision. I asked people to do their homework to understand the market value for the product, what the customer will bear. It was a little frightening how much finance was depended upon, but what it taught me more than anything is that finance really can help create value."*

"Often we spend millions of dollars to bring in big tools. But the reality of transformation is it starts with the mindset, the process, and getting your hands dirty," says Paul. "I think so many people feel that transformation is primarily a system, culture, a process," he says.

*"But it really, it starts with a mindset of, I'm going to transform what's being done to provide value. If you don't change the mindset, you're just going to continue to spend billions of dollars and at the end, you have another shiny tool that sits on the desktop."*





## INTERVIEW: DRIVING AN ITERATIVE FP&A TRANSFORMATION

Tom Seegmiller - VP FP&A at Vena in Canada

### KEY TAKEAWAYS:

- Understanding business activities is the secret sauce of planning.
- Don't force transformation out of people. Transform yourself.
- Evolution, not revolution. Baby steps add up to meaningful change.



Tom has been in the FP&A space for more than a decade, building on his financial background through successive transformational roles. Tom started out as an accountant on the audit path, but a secondment to Canadian tech company OpenText took him in a new direction. He enjoyed his time with them so much that when the time came to transition out of the audit world and into industry, he joined their FP&A team.

[READ THE FULL INTERVIEW WITH TOM](#)



*"It was around 2010 when the FP&A function was starting to take hold in the Canadian tech space," says Tom. "OpenText was 2,500 people and there were eight of us in FP&A. When I left, after eight years, the company was around 13,000 people and the FP&A team had grown to about 150 people." We want to hear more how the FP&A function evolved in those eight years of high growth.*

### CHANGING THE FP&A FOCUS

"When I showed up at OpenText, we did have a budgeting system, SAP BPC," says Tom, "but it wasn't used to drive intelligence or automation." The data collected was highly detailed and the planning process cumbersome. We had a CFO who identified a problem and had a real vision for its solution.





"We were planning every single legal entity, every cost center, every general ledger account, and every currency that we operated in," says Tom. "For context, at the time we had 140-150 legal entities. We had around five hundred general ledger accounts, five hundred cost centers, and operated in more than fifty different currencies with various degrees of weighting. If you consider the magnitude of combinations that you could be coming up with and the level of granularity, well, all you really got out of it was a data repository."

The whole FP&A team recognised the challenge facing them, and started driving transformation from within. "As we started to evolve within the function we would question, is this best practice? Are there other ways to meet the needs within the company?" says Tom.

The team set out to simplify the whole process. They revamped the entire FP&A system, moving to a driver based model within the organization and developing their ideal framework for planning and consolidations, eventually converting to adopt a SAP ERP system. The changes they implemented created significant efficiencies and reduced time to complete tasks, which was vital as the business was scaling rapidly.

"We took the time to plan for the company from weeks or months, down to days," says Tom.

## ITERATIVE TRANSFORMATION

The work that they undertook was not a formal finance transformation project. "I'd say it occurred very naturally within the team," says Tom. "We would actively prototype models group by group for the organization and the activities of the business."

Tom's outlook on the iterative process of transformation shares some of the DNA of software development. "We made a conscious effort to roll it out in phases," says Tom. "It's important to get out there and ask for feedback, to be open to iterating and changing over time."

## A GOOD USER EXPERIENCE

Delivering a good user experience improves engagement and confidence in the FP&A function.

"It's incumbent on us as strategic finance professionals to make this happen," says Tom. "If you can simplify the basic requirements - reporting, forecasting, budgeting - and remove a pain point in your stakeholder's life, it's far easier to partner on things like additional analysis and strategic planning. It earns you a seat at the table."

## THE MINDSET OF CHANGE

Transformation is never perfect, as much as we strive for it to be. "The only constant is change," says Tom. "You have to be immensely open to challenging your status quo, and you have to check your ego at the door."

It's important to acknowledge that if you do something a certain way today, it isn't necessarily the right way, but that should not be taken as a criticism.

"There might be a darn good reason why you do it that way," says Tom. "But you need to take a step back and acknowledge that we're all collectively striving to do better. That is really the mindset you have to take."







## INTERVIEW: UNLOCKING THE VALUE OF FP&A

Christian Wattig - FP&A lead at Squarespace and founder of the FP&A Bootcamp

### KEY TAKEAWAYS:

- Define the value of transformation from the perspective of the investor.
- Engage stakeholders in the process as advocates for adoption.
- Look around you and discover what is possible.



He started his career at Procter and Gamble in Switzerland before moving to the US to join Unilever. In these huge consumer goods multinationals he spent almost a decade partnering with different teams to provide FP&A support. He tells us about a successful transformation he led that was sparked by an all-too-familiar scenario.

[READ THE FULL INTERVIEW WITH CHRISTIAN](#)



"When I was at Unilever, I was partnering with the marketing team," he says. "I was leading the Center of Excellence FP&A team. I had five people reporting to me, and we were partnering with about 40 different marketing associates."

The marketing budget that Christian and his team supported was substantial.

*"This is the budget for the US market for Unilever," says Christian, "several hundred millions of dollars. But when I joined, it was all managed through Excel. Each of the twelve brand teams had their own Excel spreadsheet, and each file had between 5 and 10 tabs. Every month, my team had to take those twelve files, make sense of them, and consolidate them."*

"We realized that we didn't have enough time to actually add any value," says Christian. The value of the FP&A overview cannot be underestimated. Christian knew that his team should be spending their time on partnering with the marketing teams, being the strategic advisor, doing ROI analysis, but the manual processes slowed them down.





"I wanted to implement a proper marketing budget management system," says Christian, "a modern SAS solution, that would automate everything."

## ENGAGING THE USERS

Having laid out business case [and get the funding], Christian then had to deal with pushback from the marketing teams themselves. "They liked using Excel," he says.

The key to solving this challenge was to engage with the people. "I invited two reluctant marketing managers to join the project team to implement it. That made a big difference." They became some of the biggest advocates for the transformation.

The final step in the implementation was to engage directly with the users. This was critical to the successful transformation. "We did one-to-one coaching with all of the marketing associates," says Christian. "It made adoption smoother and faster."

## UNEXPECTED WINS

A time saving that they had not anticipated emerged in the FP&A monthly processes. "Before we implemented this, the process was very sequential," says Christian. "With connected cloud solutions we can work in parallel and the process is synchronous. That really freed up additional time."

The time savings transformed the FP&A team's business partnering.

••• *"It was much more of a conversation about what's really behind the numbers," says Christian. "It helped us to build much more business acumen."*

There was also a tangible benefit for marketing. The quality of data exposed by the new system, and the time available to drill down and identify key drivers, enabled FP&A to aid data-driven operational decision making.

## BUILDING A VISION FOR FP&A TRANSFORMATION

Christian's current focus with Squarespace and the FP&A Bootcamp is on the people and the relationships that matter for successful business partnering. "With the boot camp I'm showing people what can be possible in an environment where you have the right data and the time to build those relationships."

How can finance professionals take the first step towards FP&A transformation?

••• *"I would really like to encourage people to look outside," says Christian. "Read about what other companies are doing, see how other FP&A teams are working. The biggest blocker to transformation is that people don't know what's possible, or how much additional value FP&A could add."*

Christian's transformation story has shown the impact of reducing the number-crunching and releasing time and resources to add value to the business. It's a vision of what can be achieved.



# OUR SPONSORS



## Transform your FP&A Processes with ProStrategy

ProStrategy provides FP&A functions with modern cloud-based Enterprise Performance Management Applications which put you in control of your data, planning, reporting and analysis.

Built on IBM's market leading Planning Analytics technology which is used by thousands of companies globally, our applications bring together previously siloed processes, so users from across the business can collaborate around real-time models that share a single trusted data set.

"IBM Planning Analytics helped us to significantly transform our previously disconnected and siloed planning cycles to a single, integrated business plan."

**Finance Leader, Aer Lingus**

"Using IBM Cognos, we have control and visibility of our planning and reporting processes giving us a more confident view of where the business will be at year end and beyond."

**Bernard Sheehy, Finance Director, Brown Thomas Ireland**

"Thanks to IBM Planning Analytics, we have been able to significantly streamline our reporting and budgeting processes and gain a highly detailed view of the performance of each of our convenience brands and individual stores"

**Tim O'Leary, MIS Manager, BWG Foods**

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## We create value together by changing your finance function

We work from the inside with you creating impact that lasts. We are passionate people and how to drive mindset and behavioural change. We are finance people that believe in simple and practical solutions.

### Research and Networks

We cannot succeed with business partnering alone but must bring together individuals, organizations, and communities to tell stories from the front and share best practices. This is how we create value together! We publish new viewpoints weekly and gather the largest communities in business partnering globally.

### Learning and Development

To enhance your impact as a business partner, you must develop new capabilities and a new way of working. It sounds simple but can be difficult to do in practice. Business partnering should be considered a change project and a learning journey. We take your team on a learning journey to elevate their influence in your company through business partnering.

### Consulting

Too many consulting projects fail because they are not grounded in your company. We do this differently. Working alongside you, we create simple and pragmatic solutions that work and can be implemented. We call this inside-out consulting. We help you drive your business partnering transformation successfully and create results that matter.

"The finance organization across Danfoss has worked with the Business Partnering Institute to develop a group of highly skilled finance people. I can highly recommend this approach, that for sure has raised my expectations on what a finance business partner can and should be driving in the company."

**Thomas Auerbach, VP Finance at Danfoss**

"It was the best and most effective use of a consultant that I have experienced - combining deep finance expertise with change management and communication skills. The solution was of high quality, pragmatic and tailored to our needs"

**SVP at Global Retailer**

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