

# Strategic Evolution: Unleashing the Potential of Companywide Planning

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The Association of  
Accountants and  
Financial Professionals  
in Business



# Featured Presenter

**Pati Nishiyama**  
Product Marketing Director  
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workday®  
Adaptive Planning

# Featured Presenters



**Andy Secrest**  
SVP Colleague Service Delivery  
Director  
The Huntington National Bank



**Richard Ma**  
Senior Solution Consultant  
Workday

# Agenda

1. Companywide Planning - Overview
2. Why Workforce Planning is Essential to Strategic Organizations
3. Fireside Chat with Andy Secrest, VP Colleague Service Delivery Director, The Huntington National Bank
4. The Huntington National Bank – Deep Dive
5. Use Case Overview – Workforce Planning

# Poll Question 1:

What is your role within the Organization?

- a. FP&A
- b. HR
- c. Accounting
- d. Other

# What is Companywide Planning?

Simply Put: It's taking the best of modern finance planning and **extending it across the enterprise** so that users from all lines of businesses **actively participate** in the planning process.



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But the challenge is.....



# Today's Reality: **Disconnected** Planning



**Sales**



**Finance**



**HR**



**Marketing**



**Operations**



**IT**



# Workday Adaptive Planning

Active Planning Platform  
for Everybody



# Poll Question 2:

What is the biggest pain point about companywide planning at your organization?

- a. Low engagement and ownership by departmental business owners
- b. Different departments working towards different goals with little top down strategic considerations
- c. Slow, manual process for gathering and consolidating data from stakeholders



# Workforce Planning is critical and challenging.

People are your **most valuable and costly asset**, and yet they're challenging to plan for.

With disconnected data sources, you're stuck with a manual process with **NO source of truth**.

# Workforce Planning Goes Beyond Org Structure

Do headcount plans vs  
actuals align?

Do we have the  
workforce to meet  
production demands?

Did we over hire?

Do bottom-up  
plans align  
with strategic  
objectives?

Do we have  
full visibility  
into project  
plans?



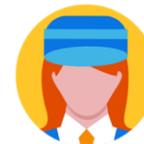
# But what if you could...

Identify resource gaps

Adjust your people plan to match your strategic goals

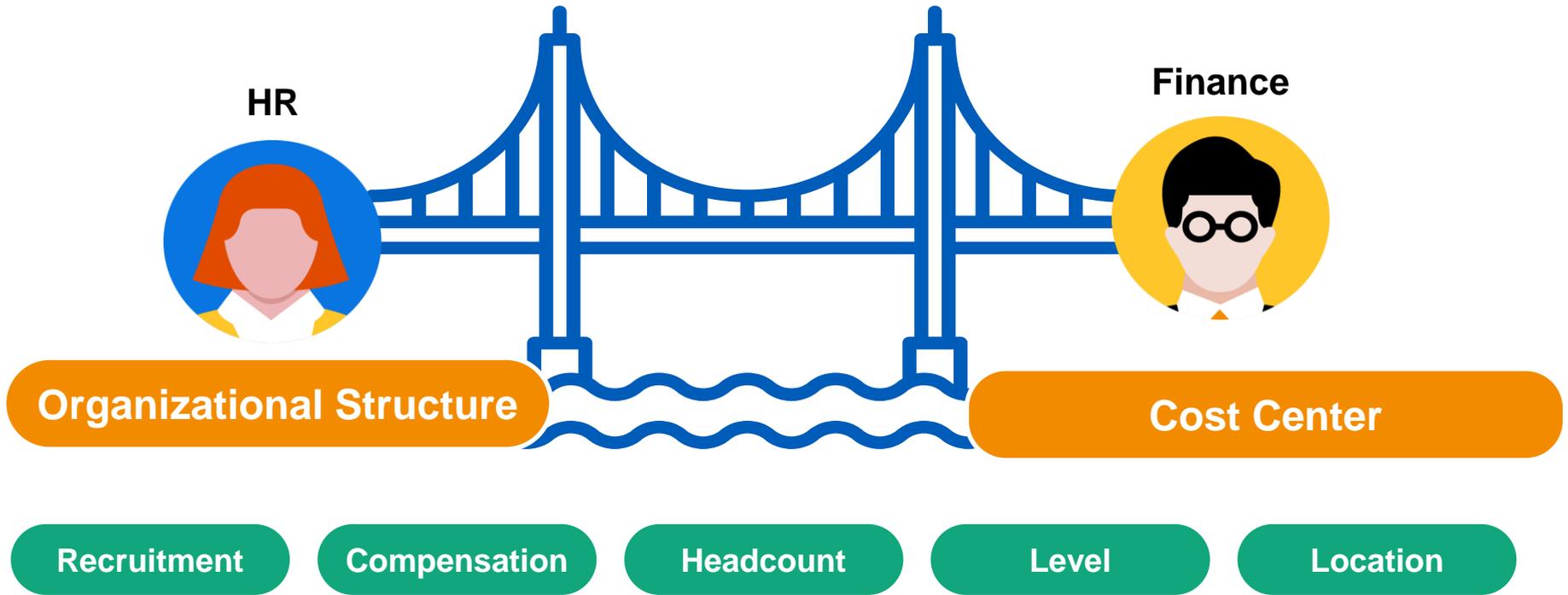
Forecast and model what-if scenarios

Continually re-prioritize workforce activity in line with changing events



# Bridging HR to Finance

Aligning to Drive Strategic Goals Forward





# Andy Secret

SVP, Colleague Service Delivery Director





## SERVING THE MIDWEST

One of top regional banks  
in the U.S.

founded in  
**1866**

Over  
**20,000**  
employees

Workday Customer  
**# 2092**

**\$189 billion**  
in assets



# Huntington

Ohio, Pennsylvania, West  
Virginia, Michigan, Kentucky,  
Indiana, Illinois, Wisconsin,  
Minnesota, Colorado, & Florida

National businesses: small business,  
auto, and inventory finance

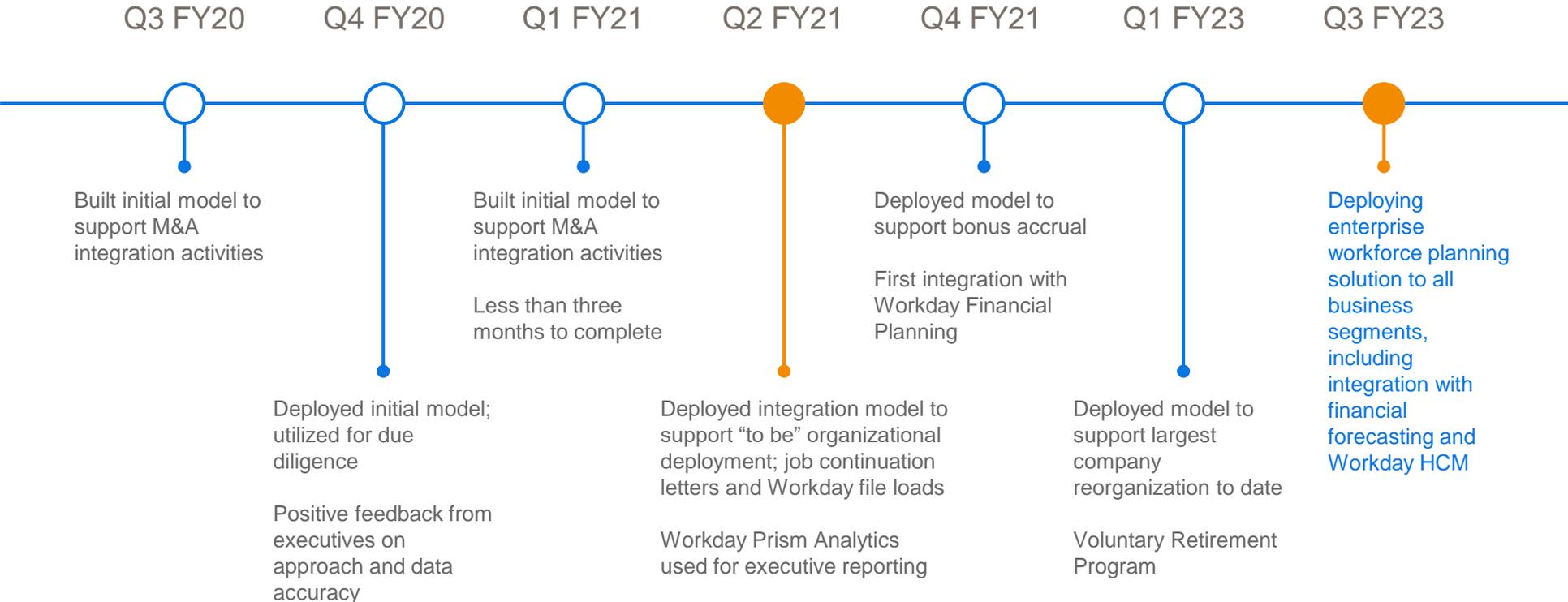
# Fireside Chat



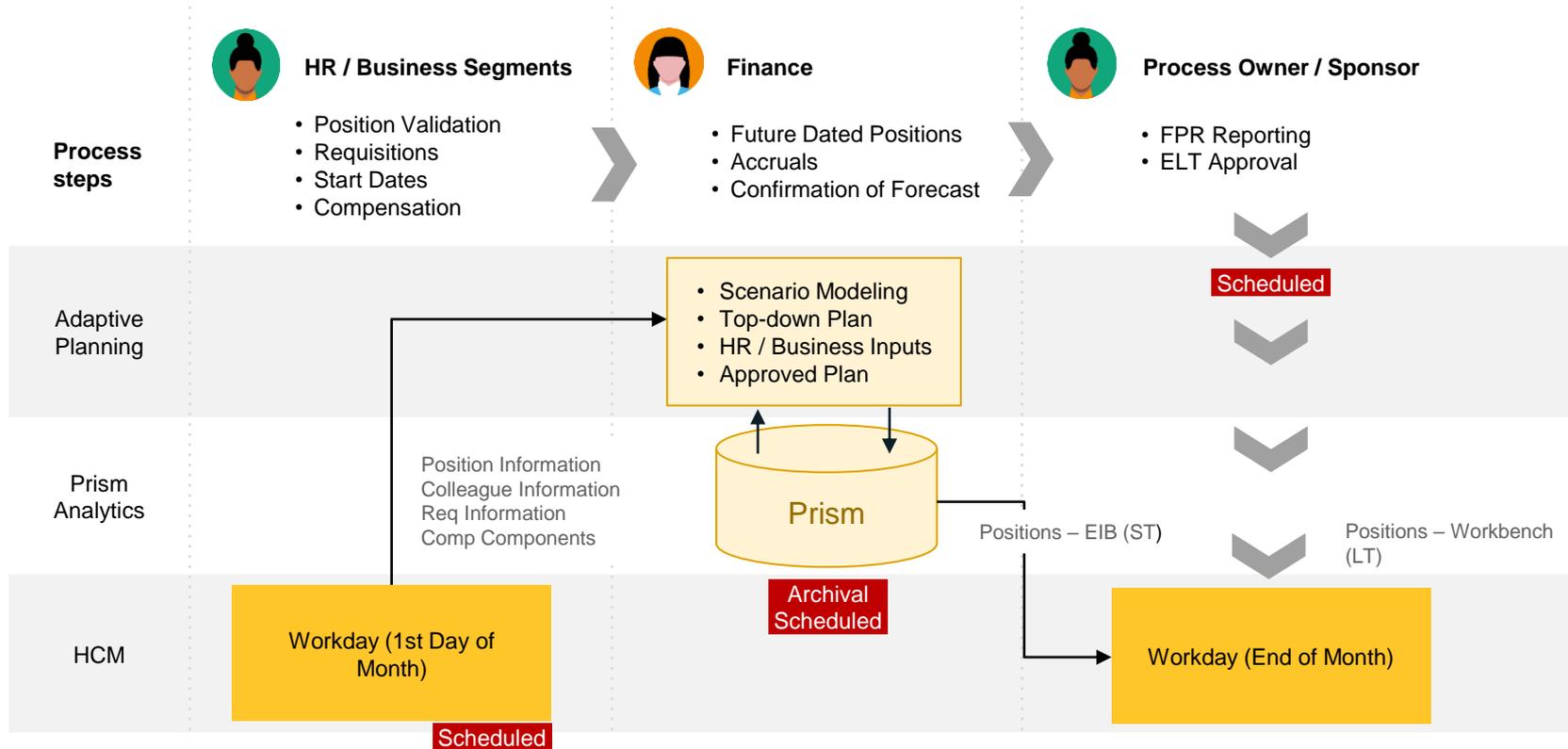
# Initial Business Case—M&A Solution

- Solution for due diligence and integration activities
- Repository for target organization HCM information (Workday Prism Analytics)
  - Allowed cross reference to key Huntington information including job profiles, locations, etc.
  - Workday Prism Analytics used as a repository for file loads with Workday—fully auditable
- Workday Adaptive Planning used for automation decisions (offer letters / job elimination) and integration with DocuSign
  - Allowed for development of “to be” organizational structure, decisions on staffing, placement, etc.

# Timeline: The Huntington Bank



# High-level Process Flow



**Impact**



# Solution Benefits



## Previously

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- Multiple versions of systems, reports, and spreadsheets
- Manual reporting (user-defined tools)
- Controls were primarily detective
- Lack of scalability and agility

## With Workday Adaptive Planning, Prism Analytics

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- Single source of truth between Workday Adaptive Planning (plan); Workday (transactional); Workday Prism Analytics (metrics/reporting)
- Automation of reporting packages, including executive reporting (Workday Prism Analytics)
- Transition to preventive controls; allow systems/processes to function and monitor exceptions
- Ability to quickly make changes and/or grow segments/business unit participation

# Use Case: Workforce Planning



# Poll Question 3

What is the biggest challenge around partnering with other parts of the business (outside of finance)?

- a. Data collection is a slow and painful process
- b. Lack of accountability
- c. Version control
- d. Other



# Richard Ma

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Sr. Solution Consultant  
Workday

# Solving Talent Needs for Business Initiatives



## Powerful modeling and scenario planning

Create a view of your workforce with a multidimensional modeling engine and compare it against other scenarios.



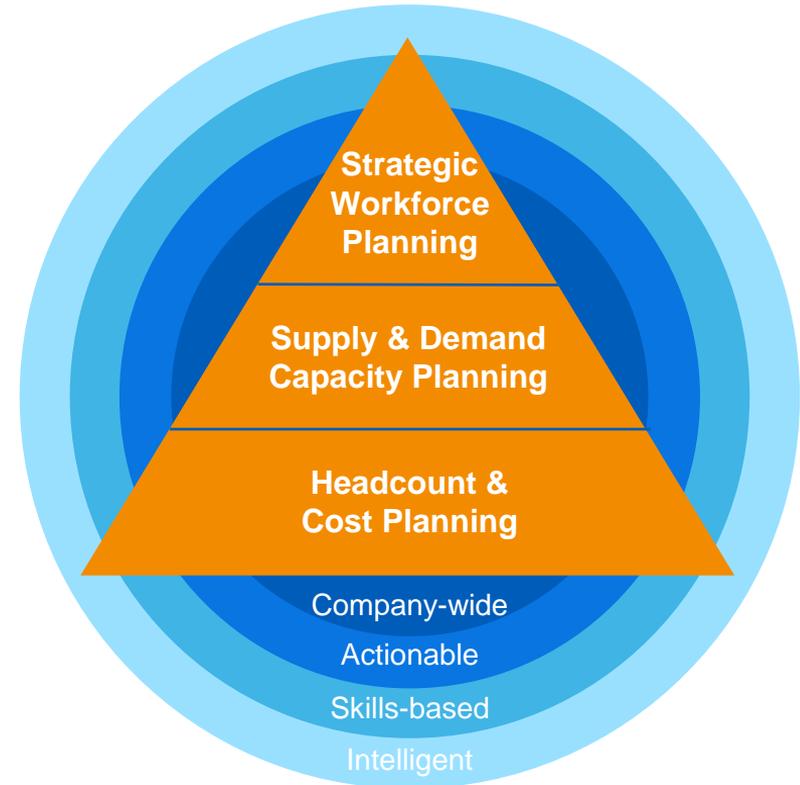
## Connected company-wide collaboration

Collaborate among stakeholders from all parts of the organization with context and workflow and gain business agility by accelerating the plan-to-execute cycle.



## Intelligent skills-based planning

Create more detailed plans with skills. Plan and forecast more quickly and accurately using embedded ML and AI capabilities.



# Poll Question 4

Are you using AI/ML in your forecasting and planning processes?

- a. No and no current plans
- b. Started researching what it means for me and my company
- c. No, but planning to in the next year
- d. Yes, we are already using it

# Questions and Answers



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# Thank you!

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